



**SIEBEL**<sup>®</sup> 7  
eBusiness

## **SIEBEL ANALYTICS USER GUIDE**

*VERSION 7.5, REV. C*

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*MARCH 2003*

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# Introduction

This guide provides you with instructions to use the Web interface to Siebel Analytics. It helps you to understand the elements in the Siebel Analytics user interface, how to navigate, and how to work with data.

# Who Should Use This Guide

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of employees in these categories:

<b>Siebel Analytics Users</b>	Persons who use a Siebel Analytics application or stand-alone Siebel Analytics, and have an understanding of how to perform analyses. Siebel Analytics application users should have domain expertise in the specific Siebel eBusiness application in which they perform analyses. For example, a user of Siebel Sales Analytics should have expertise with the processes defined by Siebel Sales. Stand-Alone Siebel Analytics users should be familiar with their organization’s data.
<b>Siebel Analytics Administrators</b>	Persons who administer stand-alone Siebel Analytics or who administer Siebel Analytics applications, including creating requests, administering reports, and adding dashboard content.

## How This Guide Is Organized

This guide contains chapters that will aid users of Siebel Analytics applications and users of stand-alone Siebel Analytics in using Siebel Analytics Web components—Siebel Answers, Siebel Intelligence Dashboards, and Siebel Delivers.

- The first chapter provides a general overview of Siebel Analytics, explains how to access the Siebel Analytics Web user interface, and provides procedures for commonly-performed tasks.
- The second chapter provides an overview of Siebel Answers, the Web interface used to query your organization's data.
- The third through eighth chapters provide information about Siebel Analytics reporting, such as creating and modifying requests, views, dashboards, and alerts.
- The remaining chapters are for users of Siebel Analytics applications. Each chapter provides an overview of a specific Siebel Analytics application.

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**NOTE:** Whether you use a Siebel Analytics application or Siebel Analytics stand-alone, you use and navigate Siebel Analytics in standard ways. Where differences exist between using Siebel Analytics stand-alone and using a Siebel Analytics application, this guide identifies them.

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## Additional Resources

The following Siebel documentation contains information that may be relevant to your use of Siebel Analytics.

- For information about administrative procedures and tasks related to Siebel Analytics Web, see *Siebel Analytics Web Administration Guide*.
- For information about administrative procedures and tasks related to Siebel operational applications, see *Applications Administration Guide*.
- *Siebel Analytics Web Online Help*.

# Revision History

*Siebel Analytics User Guide*, Version 7.5, Rev. C

## March 2003 Bookshelf

**Table 1. Changes Made in Rev. C for March 2003 Bookshelf**

Topic	Revision
<a href="#">“Integrating a Siebel Analytics Request with Microsoft Excel’s Internet Query Feature” on page 56</a>	Moved this section into the chapter “Working with Requests in Siebel Answers.” Added more explanatory text. Updated the procedure to reflect simplified integration steps.
<a href="#">“Downloading a Siebel Analytics Request” on page 28</a>	Added more information about download links and options.
<a href="#">“Adding Conditional Formatting in Siebel Answers” on page 61</a>	Added more explanatory text, including support for pivot tables. Updated the procedure to clarify the available options. Added explanations of the formatting options.
<a href="#">“Working with Siebel Analytics Pivot Table Views” on page 99</a>	Updated the procedures in this section to reflect improvements in the Add/Edit Pivot Table page.
<a href="#">“Working with Siebel Analytics Chart Views” on page 109</a>	Updated the procedures in this section to reflect improvements in the Add/Edit Chart page.

## January 2003 Bookshelf

**Table 2. Changes Made in Rev. B for January 2003 Bookshelf**

Topic	Revision
<a href="#">“Accessing Siebel Analytics” on page 22</a>	Added this section, and moved several topics into it.
<a href="#">“About Siebel Analytics Views” on page 86</a>	New topic.

**Table 2. Changes Made in Rev. B for January 2003 Bookshelf**

Topic	Revision
<a href="#">“Types of Siebel Analytics Views” on page 87</a>	New topic.
<a href="#">“General Steps for Working with Siebel Analytics Views” on page 91</a>	New topic.
<a href="#">“Working with Siebel Analytics Title Views” on page 92</a>	New topic.
<a href="#">“Working with Siebel Analytics Narrative Views” on page 96</a>	Added explanatory text.
<a href="#">“Creating a Global Filter in Siebel Answers” on page 78</a>	New topic.
<a href="#">“Integrating a Siebel Analytics Request with Microsoft Excel’s Internet Query Feature” on page 56</a>	New topic.

## **November 2002 Bookshelf**

**Table 3. Changes Made in Rev. A for November 2002 Bookshelf**

Topic	Revision
<a href="#">“Getting Started with Siebel Analytics” on page 17</a>	This section was renamed (the former name was Siebel Analytics Overview). Enhanced the introduction, clarified user roles, and added additional commonly used procedures.
<a href="#">“Performing Common Tasks in Siebel Analytics” on page 27</a>	This section was renamed (the former name was Getting Started with Siebel Analytics).
Siebel Analytics Applications	Deleted this topic.
<a href="#">“Printing a Siebel Analytics Dashboard or Request” on page 27</a>	New topic.
<a href="#">“Emailing a Siebel Analytics Dashboard or Request” on page 28</a>	New topic.

**Table 3. Changes Made in Rev. A for November 2002 Bookshelf**

Topic	Revision
<a href="#">“Downloading a Siebel Analytics Request” on page 28</a>	New topic.
<a href="#">“Creating Adobe Portable Document Format (PDF) Files” on page 30</a>	New topic.
<a href="#">“Saving Siebel Analytics Reports to a Lotus Notes Database” on page 49</a>	New topic.
<a href="#">“Using Column Selectors in Siebel Answers Requests” on page 51</a>	New topic.
<a href="#">“Using Custom Date/Time Format Strings in Siebel Answers” on page 65</a>	New topic.
<a href="#">“Using Multiple Page Drop-Down Lists in Siebel Analytics Pivot Tables” on page 101</a>	New topic.
<a href="#">“Overriding Default Aggregation Rules in Siebel Analytics Pivot Tables” on page 102</a>	New topic.
<a href="#">“Showing an Item’s Relative Value in Siebel Analytics Pivot Tables” on page 103</a>	New topic.
<a href="#">“Using Calculations in Siebel Analytics Pivot Tables” on page 104</a>	New topic.
Index	Added an index.





# Getting Started with Siebel Analytics

# 1

This chapter describes the major features and functions of Siebel Analytics that you typically work with. It explains how Siebel Analytics works, how security settings are determined, how to access Siebel Analytics, and provides procedures for commonly performed tasks.

# About Siebel Analytics

Typically, organizations track and store large amounts of data about products, customers, prices, contacts, activities, assets, opportunities, employees, and other elements. This data is often spread across multiple databases in different locations with different versions of database software.

After the data has been organized and analyzed, it can provide an organization with the metrics to measure the state of its business. This data can also present key indicators of changes in market trends and in employee, customer, and partner behavior. Siebel Analytics helps you obtain, view, and analyze the data.

This topic contains the following information:

- [“How Siebel Analytics Works”](#)
- [“If You Are a User of a Siebel Analytics Application” on page 19](#)
- [“If You Are a User of Stand-Alone Siebel Analytics” on page 21](#)

## How Siebel Analytics Works

This topic provides a broad overview of Siebel Analytics and how it works, from an end-user perspective.

Siebel Analytics has four main components:

- **Siebel Analytics applications.** For sites with Siebel eBusiness Applications, a Siebel Analytics application is a configurable analytic application, accessible from a Siebel eBusiness application, that uses industry best practices and addresses key functional areas across Siebel applications within an organization. Siebel Analytics applications are integrated with Siebel eBusiness Applications, also referred to as Siebel operational applications, to provide business metrics in reports, in context with an organization’s business function and industry.

- **Siebel Answers.** Siebel Answers provides answers to business questions. It allows you to explore and interact with information, and present and visualize information using charts, pivot tables, and reports. You can save, organize, and share the results.

Requests that you create with Siebel Answers can be saved in the Siebel Analytics Web Catalog and integrated into any Siebel Analytics home page or dashboard. Results can be enhanced through charting, result layout, calculation, and drilldown features.

- **Siebel Intelligence Dashboards.** Dashboards provide points of access for analytics information. Results from Siebel Answers can be placed into dashboards for your use or use by others. (When you access Siebel Analytics, your default dashboard is typically the first screen that you see.)

Dashboards are typically used to display reports specific to the needs of users or groups. Siebel Analytics allows you to create your own dashboards or to access preconfigured dashboards. Historical and current data sources can be merged into a single dashboard.

- **Siebel Delivers.** Siebel Delivers is the interface used to create alerts based on analytics results. You can use Siebel Delivers to detect specific results within reports and immediately notify the appropriate person through Web, wireless, mobile, and voice communications channels. For example, if you want to be notified when a particular event occurs, such as one of your accounts going critical, you can set up an alert that will notify you through a number of delivery options, such as email or your cell phone.

Siebel Delivers uses intelligence bots called iBots. iBots are software-based agents, driven by schedules or events that can access, filter, and perform analytics on data based on criteria you specify.

## **If You Are a User of a Siebel Analytics Application**

For organizations with Siebel Analytics applications, Siebel Analytics is integrated into Siebel eBusiness operational applications. For example, Siebel Sales Analytics applications are integrated into the Siebel Sales operational application. Applications include Extract Transform Load (ETL) routines to create the Siebel Data Warehouse. They also contain metadata that maps to the Siebel Data Warehouse and the transactional database, and define key measures and metrics for all levels of the organization.

Siebel Analytics applications also include preconfigured reports on preconfigured dashboards that cover the majority of business reporting needs. These reports and dashboards deliver information to you based on your organizational responsibility. The data being analyzed is located in the Siebel Data Warehouse. The subject areas that you use when constructing reports are included with your Siebel Analytics application.

### Security in Siebel Analytics Applications

Siebel Analytics applications use security mechanisms that allow only authorized users to access data. There are three types of security in Siebel Analytics applications:

- **Analytics application business logic object security.** This controls access to objects, such as subject areas, tables, and columns. For example, users in a particular department can view only the subject areas that belong to their department.
- **Web object security.** This provides security for objects stored in the Siebel Analytics Web Catalog, such as dashboards, dashboard pages, folders, and reports. You can view only the objects for which you are authorized. For example, a mid-level manager may not be granted access to a dashboard containing summary information for an entire department.
- **Data level security.** This controls the type and amount of data that you can see in a report. When multiple users run the same report, the results that are returned to each depend on their access rights and roles in the organization. For example, a sales vice president sees results for all regions, while a sales representative for a particular region sees only data for that region.

The security mechanisms in Siebel Analytics applications use the security hierarchies defined in Siebel eBusiness Applications. This minimizes the need for Siebel Analytics administrators to manage two security systems. It also allows a high degree of control over access to elements in Siebel Analytics applications.

## **If You Are a User of Stand-Alone Siebel Analytics**

Stand-alone Siebel Analytics is not shipped with metadata, preconfigured reports, or preconfigured dashboards. Instead, a system administrator in your organization uses Siebel Analytics to organize corporate data and create subject areas for you to use when constructing reports. Administrators also set up user security in Siebel Analytics.

Administrators may set up several reports and dashboards for you, or customize the look and feel of the user interface to resemble your organization's corporate style.

# Accessing Siebel Analytics

This topic explains how to access and exit Siebel Analytics:

- [“Accessing a Siebel Analytics Application”](#)
- [“Accessing Stand-Alone Siebel Analytics” on page 25](#)

## Accessing a Siebel Analytics Application

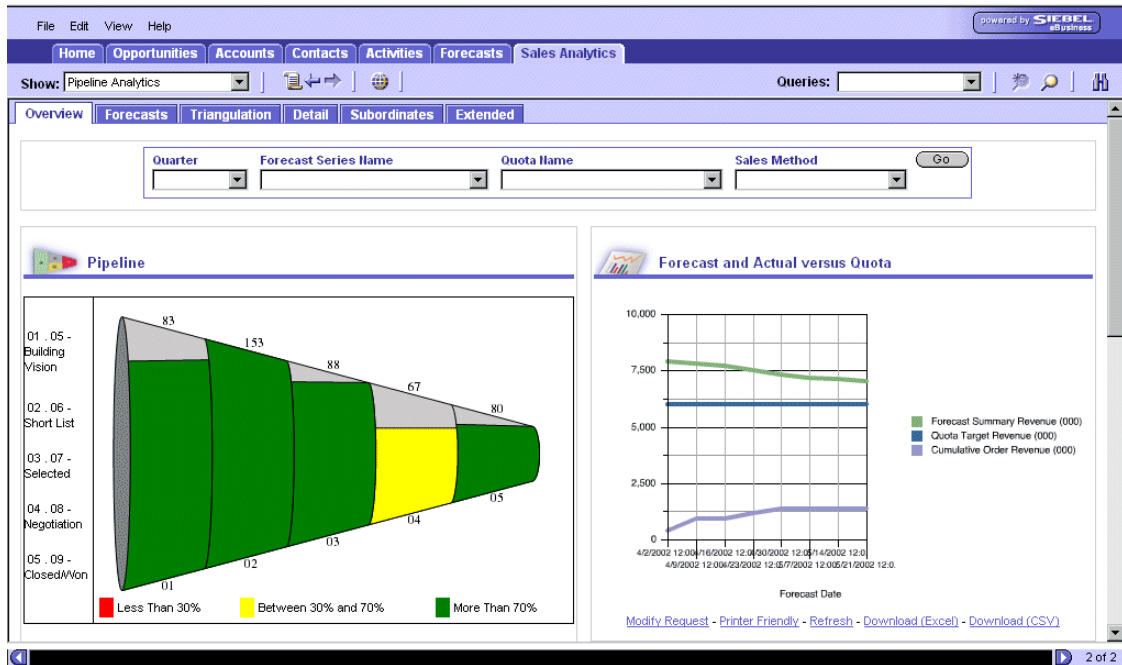
Depending on your organization’s Analytics options, you may be able to access one or more Siebel Analytics applications in your Siebel eBusiness application.

### ***To access Siebel Analytics in a Siebel eBusiness application***

- Navigate to the Analytics tab for the application and click it.

The default dashboard for your role and responsibilities appears.

Figure 1 shows a sample dashboard for a Siebel Analytics application.



**Figure 1. Sample Siebel Analytics Application Default Dashboard**

Siebel Analytics applications are organized into dashboards and pages. In Figure 1, the default dashboard is Pipeline Analytics, as shown in the Show drop-down list. Each dashboard contains one or more pages that display reports targeted to a specific business industry or group of users. In Figure 1, the pages on the Pipeline Analytics dashboard are shown as tabs across the top of the dashboard. The dashboard is showing the Overview page.

For information about the preconfigured dashboards and reports in Siebel Analytics applications, see the following topics:

- [“Siebel Consumer Goods Sales Analytics” on page 147](#)
- [“Siebel Communications, Media, and Energy Analytics” on page 151](#)
- [“Siebel Workforce Analytics” on page 155](#)
- [“Siebel eInsurance Analytics” on page 159](#)
- [“Siebel eHealthcare Analytics” on page 163](#)
- [“Siebel eFinance Analytics” on page 165](#)
- [“Siebel Order Analytics” on page 171](#)
- [“Siebel Product Analytics” on page 175](#)
- [“Siebel Marketing Analytics” on page 179](#)
- [“Siebel Partner Relationship Management Analytics” on page 185](#)
- [“Siebel ePharma Analytics” on page 193](#)
- [“Siebel Sales Analytics” on page 199](#)
- [“Siebel Service Analytics” on page 203](#)



## Accessing Stand-Alone Siebel Analytics

To access stand-alone Siebel Analytics, you use a URL, a user ID, and a password provided by your organization.

### To access stand-alone Siebel Analytics

- 1 Type the URL into the address field on your browser.

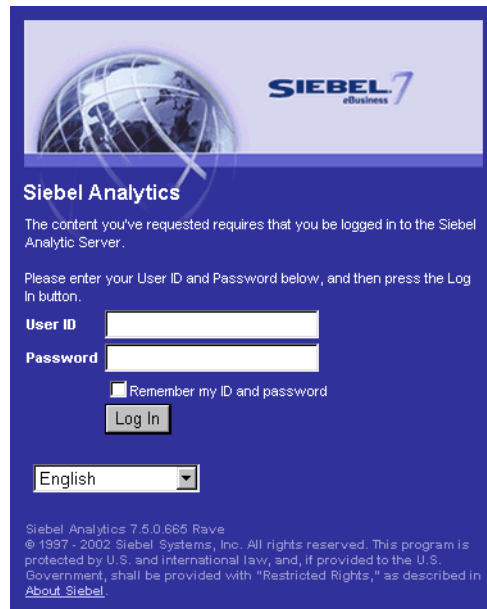
You can also add the URL to your list of Favorites.

The Siebel Analytics login screen appears.

---

**NOTE:** A sample login screen is shown below. Your login screen may look different than the sample.

---

The image shows a screenshot of the Siebel Analytics login interface. At the top, there is a header with a globe icon and the Siebel 7 eBusiness logo. Below the header, the text "Siebel Analytics" is displayed. A message states: "The content you've requested requires that you be logged in to the Siebel Analytic Server." Below this, a prompt says: "Please enter your User ID and Password below, and then press the Log In button." There are two input fields: "User ID" and "Password". Below the "Password" field is a checkbox labeled "Remember my ID and password". A "Log In" button is positioned below the checkbox. At the bottom, there is a language selection dropdown menu currently set to "English". A small copyright notice is visible at the very bottom: "Siebel Analytics 7.5.0.685 Rave © 1997 - 2002 Siebel Systems, Inc. All rights reserved. This program is protected by U.S. and international law, and, if provided to the U.S. Government, shall be provided with 'Restricted Rights,' as described in About Siebel."

- 2 Type your user ID and password.
- 3 From the drop-down list, select the language in which you want to work.

- 4 Click Login to submit your login credentials.

After your user ID and password have been verified, the screen that has been assigned as your default screen appears. This is usually a dashboard called My Dashboard. The Siebel Analytics user interface screens will appear in the language you selected.

## Performing Common Tasks in Siebel Analytics

This topic explains how to perform common tasks in Siebel Analytics:

- [“Exiting from Siebel Analytics”](#)
- [“Printing a Siebel Analytics Dashboard or Request”](#)
- [“Emailing a Siebel Analytics Dashboard or Request” on page 28](#)
- [“Downloading a Siebel Analytics Request” on page 28](#)
- [“Refreshing a Siebel Analytics Dashboard or Request” on page 29](#)
- [“Creating Adobe Portable Document Format \(PDF\) Files” on page 30](#)

### Exiting from Siebel Analytics

Do not close the browser window to exit from Siebel Analytics.

#### ***To exit from Siebel Analytics***

- From any Siebel Analytics page, click the Log Out link.

### Printing a Siebel Analytics Dashboard or Request

Siebel Analytics allows you to display printer-friendly versions of existing dashboards and requests. A printer-friendly version does not contain any extraneous links or other hypertext items.

#### ***To print a dashboard or a request***

- 1 Navigate to an existing dashboard or request.
- 2 Click the Printer Friendly link.

A new window shows the selected item without the extraneous links.

- 3 On the browser menu, choose File > Print.

## Emailing a Siebel Analytics Dashboard or Request

You can email a dashboard page or a request as a Web archive (.mht) file.

### **To email a dashboard page or request**

- 1 Navigate to the dashboard page or request that you want to send.
- 2 Click the Printer Friendly link.

A new browser window opens that contains the dashboard page or the request.

- 3 From the browser's toolbar, choose File > Save As.
- 4 Save the file to the desired location, with a file type of Web Archive, Single File (\*.mht).
- 5 Send the saved .mht attachment using an email application.

---

**NOTE:** The \*.mht files can also be used as a means to archive and restore requests as they exist at a particular point in time.

---

## Downloading a Siebel Analytics Request

Siebel Analytics allows you to download the underlying data for an existing request as a Microsoft Excel file (.xls format), and as a comma-separated list of values (.csv format). In Siebel Answers, these download options appear as the links Download (Excel) and Download (CSV). These links can also appear with a request in a dashboard.

### **To download a request in Microsoft Excel format**

- 1 Navigate to the request.
- 2 Click the Download (Excel) link.
- 3 Save the .xls file to the desired location, or open it in Excel.

This makes the request results available to Microsoft Excel in HTML format, including tables or charts that are displayed with the results. It also includes any other views included in the report. Excel controls the positioning of the HTML.

- 4 If necessary, use Excel to refine the formatted results.

For information, see your Excel documentation.

***To download a request as a comma-separated list of values***

- 1 Navigate to the request.
- 2 Click the Download (CSV) link, and save the file on your hard drive.

After downloading a request in .csv format, you can use a third-party application to display the data.

## **Refreshing a Siebel Analytics Dashboard or Request**

Siebel Analytics uses a temporary storage area, called cache, to save frequently-accessed or recently-accessed results. Storing certain results in cache helps to speed up operations.

When you select a specific request or dashboard, Siebel Analytics first checks the cache to determine if the item has recently been requested. If it has, Siebel Analytics sends the most recent copy stored in the cache. You can use the Refresh feature to make sure that Siebel Analytics bypasses the saved information in the cache and regenerates the information you want.

***To refresh a dashboard or request***

- 1 Navigate to an existing dashboard or request.
- 2 Click the Refresh link.

### **Creating Adobe Portable Document Format (PDF) Files**

You can create documents in PDF format that include Siebel Analytics reports and dashboards by using a client-side plug-in, available from Adobe Systems Incorporated.

#### ***To create an Adobe PDF file***

- 1** Install the Adobe client-side plug-in and enable the Print to PDF function.
- 2** Navigate to the report or dashboard that you want to save as a PDF file.
- 3** Choose File > Print.
- 4** Select the Adobe PDF printer driver from the list of printers and click Print.

## Navigating in Siebel Analytics

This topic explains basic navigation within Siebel Analytics:

- [“What You See After Accessing Siebel Analytics”](#)
- [“Using Siebel Analytics Feature Links” on page 33](#)
- [“Working with Siebel Analytics Pages” on page 34](#)
- [“Drilling Down in Siebel Analytics” on page 34](#)

### **What You See After Accessing Siebel Analytics**

When you access Siebel Analytics, the first screen you usually see is a dashboard. Dashboards show reports and other information for your area of responsibility.

You can change the appearance of the My Dashboard page based on your personal preferences. For more information about dashboards, see [Chapter 7, “Using Siebel Intelligence Dashboards.”](#)

Figure 2 shows a sample My Dashboard page from a Siebel Analytics application.

**NOTE:** Your dashboard may look different than the sample, or you may see a different page entirely.

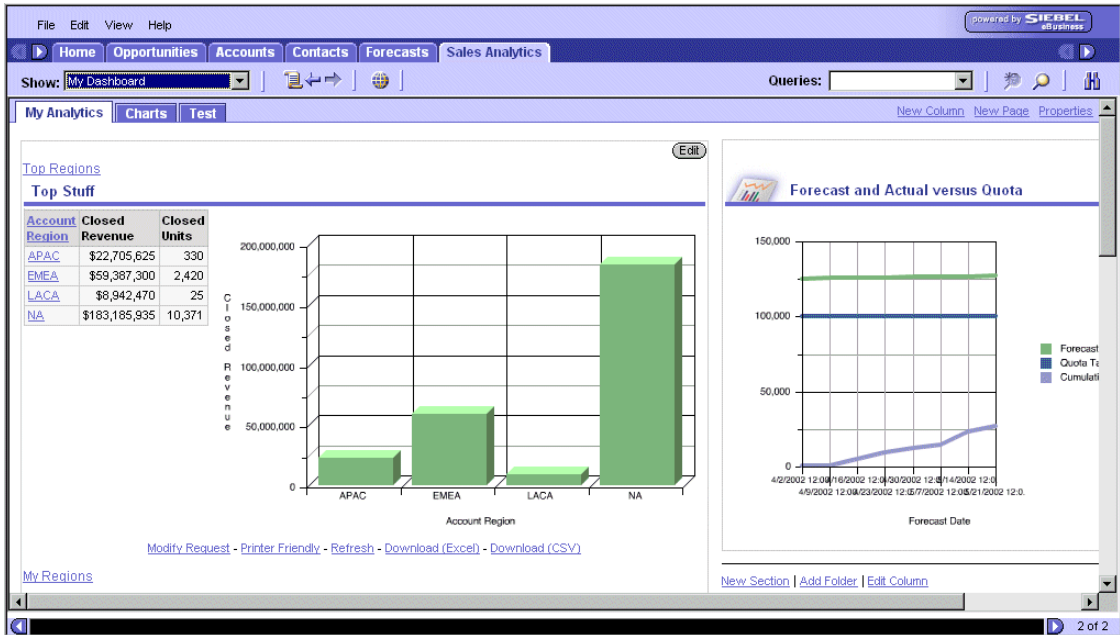


Figure 2. Example My Dashboard Page



## **Using Siebel Analytics Feature Links**

This topic describes the links that provide access to Siebel Analytics functions:

- In stand-alone Siebel Analytics, the links are located in the upper right corner of the page. The links you see are determined by your privilege settings.
- In Siebel Analytics applications, the links New Column, New Page, and Properties are located on the Analytics tab, if you have permission to access those links. You can access other links as views, such as My Dashboard, My Analytics Profile, Answers, Delivers, Alerts, and Analytics Web Administration, by choosing View > Site Map. The views that you can access are determined by your role and responsibilities.

### **Alerts!**

Accesses the Active Alerts page, from which you can view and manage your active alerts.

### **My Account**

Accesses the My Account page, from which you can view general account information and set your preferences for the Siebel Analytics application.

### **Answers**

Accesses Siebel Answers, from which you can view, create, and manage your requests.

### **Dashboards**

Accesses the Intelligence Dashboard page, from which you can access specific dashboards to which you have access.

### **Log Out**

Used to log out of the Siebel Analytics application. Always use this link to log out of Siebel Analytics.

### Working with Siebel Analytics Pages

Siebel Analytics is organized into pages. Pages have three components:

- **Panes.** Both the Siebel Delivers and Siebel Answers pages display a left and a right pane. The left pane is the selection pane, used to navigate to, select, and manage saved information. The right pane is used to display and work with the content selected in the left pane.
- **Areas.** Pages are organized into areas. Each area within a page focuses on specific content or options.
- **Tabs.** Tabs provide access to other pages related to the current page. The tabs appear in the top part of the page. The list of available tabs depends on which page you select.

Siebel Analytics feature links are used to access these pages. Each feature link provides access to a specific feature or topic. Pages can contain other organization and navigation elements, such as tabs, areas, and panes.

For information about feature links, see [“Using Siebel Analytics Feature Links” on page 33](#).

### Drilling Down in Siebel Analytics

Many of the results that appear in Siebel Analytics represent hierarchical data structures. Siebel Analytics metadata specifies these hierarchies, and this allows you to access the different levels of detail within them. For example, information in a sales chart may be categorized by region. Clicking on a specific region in the chart may display each country within that region, if the country is the next level within the hierarchy of the metadata.

You can drill down to an actual item in the database. For example, if you work in sales, you can drill down to the city level within a sales report, and see that there is a large sale pending in Paris. If you are using a Siebel eBusiness application, you can then drill down on the pending sale and go directly to that opportunity in the Siebel eBusiness application.

## Using the Siebel Analytics My Account Page

From the My Account page in Siebel Analytics, you can perform the following tasks:

- View general account information, such as your display name and user ID.
- View and modify your preferences.
- View and modify your delivery options for iBots.

For information about iBots, see [“Overview of Siebel Delivers” on page 140](#).

- View and manage your group memberships for Siebel Analytics.

### **To display your account settings**

- 1 Navigate to Siebel Analytics.
- 2 Click the My Account link.

Your My Account page appears.

## Setting Siebel Analytics Preferences

You can access the Preferences section of the My Account page to perform the following tasks:

- Select a default dashboard.
- Set your location.
- Set your language preference.

### **To change your preferences**

- 1 Navigate to Siebel Analytics.
- 2 Click the My Account link.

**3** In the Preferences section, do one of the following:

- In the Default Dashboard drop-down list, select the dashboard you want to display when you log in to Siebel Analytics.
- In the Locale drop-down list, select the locale that you want to use for this session.
- In the Use Interface language drop-down list, select the language in which you want Siebel Analytics to appear.

### Setting Siebel Analytics Delivery Options

The Delivery Options section of the My Account page allows you to add or modify the devices on which you receive notifications from Siebel Delivers. For more information about setting your delivery options, see [“Configuring Your Siebel Delivers Options” on page 141](#).

### Quitting Siebel Analytics Group Membership

The Group Membership section of the My Account page shows the groups to which you belong. The groups that appear in this section determine which Siebel Analytics features and dashboards you can access.

#### ***To quit a Siebel Analytics group***

- 1** Navigate to Siebel Analytics.
- 2** Click the My Account link.
- 3** In the Group Membership section, click the Quit link for the group you want to quit.

The group is removed from your Group Membership section. Any dashboards associated with the group are no longer accessible to you.

- 4** Click Finished.

## Siebel Answers Overview

# 2

Siebel Answers is the Siebel Analytics interface used to query your organization's data. The results of your request can be saved, organized, shared, and integrated with other content. This chapter provides a general overview of Siebel Answers.

# About Requests in Siebel Answers

Use Siebel Answers to create and manage requests. The primary purpose of a request is to retrieve data from your organization's data sources. The request presents that data in a way that helps you to interpret it and to make informed decisions based on it.

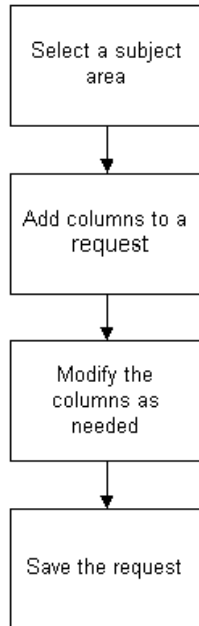
Siebel Answers provides a point-and-click interface and a set of graphical tools that allow you to create and execute requests without having to know or understand the query language used to access the data. You create requests by selecting columns from subject areas. After you create a request, you can work with the results and display them in a customized view to suit your needs, such as a chart, table, or diagram.

You can save the customized results and incorporate them into your My Dashboard page or another dashboard to which you have access. You can also combine your customized results with several other forms of data, such as external Web content, HTML, text, graphics, and links to other sites. This information can be presented formally within a dashboard as a report.

For more information about creating requests, see [Chapter 3, "Working with Requests in Siebel Answers."](#)

## General Business Process Flow for Requests in Siebel Answers

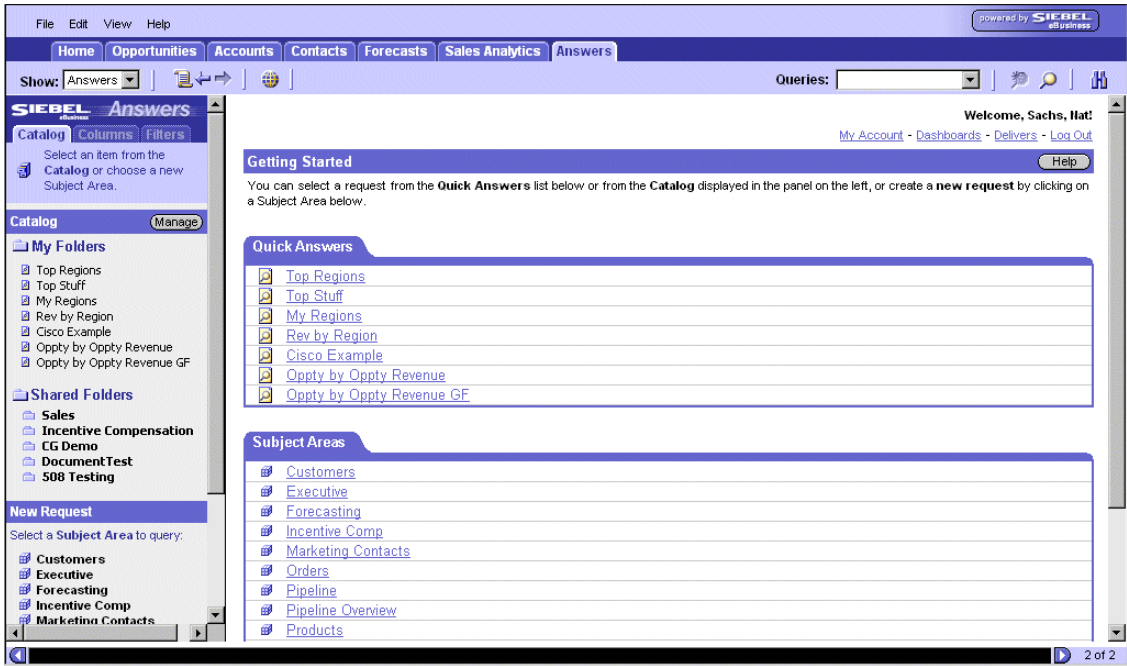
Figure 3 shows an example of a process flow for Siebel Answers. The first step is to create a request. The second step is to format the request. The third step is to filter the request. The fourth and last step is to create a view. You may follow a different process flow according to your business requirements.



**Figure 3. General Business Process Flow for Requests in Siebel Answers**

# About the Workspace in Siebel Answers

Siebel Answers provides access to previously saved requests. As illustrated in [Figure 4](#), Siebel Answers contains two panes. The selection pane on the left contains the Catalog, Columns, and Filters tabs. The pane on the right contains the feature links at the top of the page and the Getting Started area just below. This pane contains the Quick Answers and Subject Areas tabs.



**Figure 4. Example Siebel Answers Page**

This page provides access to previously saved requests from the Quick Answers list and from the folders in the Web Catalog displayed in the selection pane. You can also create a new request by selecting the desired subject area.



## Left Pane (Selection Pane)

The left pane of Siebel Answers is the selection pane. Use this to view the subject area, columns, and filters to include in a request. When you are at the Criteria tab (described in [Table 4](#)), click on an item to include it in a request.

## Right Pane

The right pane contains the tabs that you use to create requests and work with results. [Table 4](#) shows information about these tabs.

**Table 4. Siebel Answers Tabs**

Tab	Description
Criteria Tab	Create a new request by selecting the appropriate columns and filters. The Criteria tab is also used to modify existing requests.
Results Tab	View and work with request results.
Views Tab	Create different views of a request, such as charts, tickers and pivot tables.
Advanced Tab	Work directly with the SQL generated for a request.  The Advanced tab is recommended for use only by developers or experienced users with complex data analysis needs and capabilities. Only users with the appropriate responsibilities are given access to the Advanced tab.

After you create a new request or execute a saved request, the results can be customized on the Results tab, or enhanced on the Views tab to include new views of the data. For example, the default results display is a table with a title. You can add additional views to your results, or delete the current view and substitute a different view.

For example, you can add a pivot table or chart view to your current results, or delete the default table view and substitute a nested request. You can reference the results of a request from an external Web page, portal, or application. You do this by clicking a link on the Advanced tab that allows you to execute the request. This tab also allows you to add clauses to the SQL statements for the request, or edit the SQL statements directly.

### Criteria Tab

Use the Criteria tab to construct a request by asking a question or modifying selected columns, adding values, and filters. The Criteria tab provides access to the columns selected for the request. You can specify the order in which the results should be returned, column subtotals, formatting (such as headings and number of decimal places), and column formulas (such as adding a Rank or Percentile function). You can also add or modify column filters.

### Results Tab

Use the Results tab to view and work with query results. Click Customize View to modify or add a view to the Results view for the request. You can download the results as a comma-separated list of values, suitable for import by a spreadsheet or database application. Alternatively, you can display the results in a page suitable for printing, saving, or sending through email.

### Views Tab

Use the Views tab to access Siebel Analytics Web presentation capabilities, which are used to customize query results.

The Views tab allows you to customize results by including a variety of views, including charts, pivot tables, nested requests, plain or formatted text, HTML, and formatted tables. The default results view is a simple table. Views can be combined and positioned anywhere on the page, and any number of view types can be included in the results.

For example, you can create results including side-by-side pivot tables that reflect different views of the data, charts that allow you to explore interrelationships in depth, and filters that limit the results. If the request is embedded in a dashboard, the dashboard page can also include links to additional requests of interest, related graphics, news stories, and so on.

### Advanced Tab

Use the Advanced tab to view and work directly with the SQL statements generated for the request. The Advanced tab shows the SQL statements for the request and allows you to change the subject area or to add advanced SQL statements. The Advanced tab also provides access to links that you can use to execute the request from an external Web page, portal, or application in the Referencing the Results section.

## Working with Requests in Siebel Answers

# 3

Siebel Answers provides you with point-and-click functions to create and execute your own requests. This chapter explains the procedures used to create, modify, and administer requests.

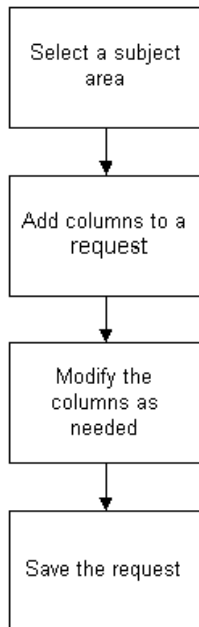
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**NOTE:** Before you begin working with requests, make sure that you have read [Chapter 1, “Getting Started with Siebel Analytics”](#) and [Chapter 2, “Siebel Answers Overview.”](#) These topics describe the Siebel Answers user interface and how to navigate in it.

---

## Business Process Flow for Creating a Request

Figure 5 shows an example of a process flow for creating a new request in Siebel Answers. The first step is to select a subject area. The second step is to add columns to a request. The third step is to modify the columns as needed. The fourth and last step is to save the request. You may follow a different process flow according to your business requirements.



**Figure 5. Process Flow for Creating a Request**

## Selecting a Subject Area in Siebel Answers

Siebel Analytics presents data in *subject areas*. Subject areas contain columns that represent information about the areas of your organization's business, or about groups of users within your organization.

Subject areas have names that correspond to the types of information they contain, for example, Marketing Contracts, Service Requests, and Orders. Columns also have names that indicate the types of information they contain, such as Account and Contact.

### ***To select a subject area for a new request in Siebel Answers***

- 1** Navigate to Siebel Answers.
- 2** In the New Request area of the selection pane, click the subject area you want to use.

After you have selected a subject area to work with, you can create a request. The right pane contains the tabs that you use to work with requests—the Criteria, Results, Views, and Advanced tabs. See [“Creating and Saving Requests in Siebel Answers” on page 46](#) for more information.

## Creating and Saving Requests in Siebel Answers

A Siebel Analytics request contains SQL statements that are automatically generated through the point-and-click features in Siebel Answers. A request also contains information about how you want the results to appear, and can also include different views of the data.

When you run a request, the associated SQL statements are executed and the results are returned in the format you specify, such as in an interactive table or a chart. The default format is to have results returned in a table.

### **To create a new request in Siebel Answers**

- 1** Navigate to Siebel Answers.
- 2** Select a subject area by doing the following:
  - a** In the selection pane, click the Catalog tab.
  - b** In the New Request list, click a subject area to query.

The selection pane refreshes and shows the Columns tab.

- 3** To see the columns in a subject area, click on the plus sign ( + ) to expand it.
- 4** To add a column to the request, click it.

The selected column appears in the Requested Columns view in the right pane, on the Criteria tab.

- 5** Click on additional columns to add them to the request.

---

**NOTE:** A request can include columns from only one subject area.

---

- 6** To see the results, click the Results tab in the right pane. You can also click Go.  
The results appear in a table.

---

**NOTE:** In Siebel Analytics applications, the Results tab might display an ODBC error if you do not include at least one measure in your request. (A measure, also known as a fact or a value, is a numeric additive quantity, such as price per unit or number of closed service requests.) If a request returns an ODBC error, add a measure to the request, and then run the request again. Adding a measure allows a meaningful result to be returned.

---

If you plan to run the same request again, you can save the request.

## **Saving a New Request in Siebel Answers**

You can save a new request in your personal Siebel Analytics folder or, if you belong to a group, you can save it in the group's shared folder. Requests that are saved in your personal Siebel Analytics folder are added to your Quick Answers list. Requests that are saved in your My Folders directory can only be viewed, run, and modified by you. Requests that are saved in shared folders can be viewed, run, and modified by other users who belong to that group.

### **To save a request in Siebel Answers**

- 1** In Siebel Answers, create or modify a request as needed.
- 2** Click Save.  
The Save Request page appears.
- 3** At the top of the Save Request area, click the appropriate folder link in which you want to save the request.
- 4** To create a new folder in which to save the request, do the following:
  - a** Click the Create New Folder link.
  - b** In the Folder Name field, type a descriptive name for the folder.
  - c** In the Description field, type a brief description. For example, you could specify the type of information you are saving in the folder.

- d Click Create Folder.
- 5 Click Save Request Here.
- 6 In the Name of Request field, type a descriptive name for the request.
- 7 In the Description field, type a brief description of the request.

Typing a description is optional, but is a recommended best practice.
- 8 Click Save.

### **Saving Quick Answers Requests in Siebel Answers**

Requests that you save into your primary folder, titled My Folders, are automatically added to your Quick Answers list. (The Quick Answers list appears in the right pane when you first access Siebel Answers, and provides links to the requests that you run most often.)

#### ***To save a request to your Quick Answers list in Siebel Answers***

- 1 In Siebel Answers, create or modify a request as needed.
- 2 Click Save.

The Save Request page appears.
- 3 Make sure My Folders is selected as the location.

---

**NOTE:** If My Folders is not the selected location, click the Change Location link and navigate to My Folders.

---

- 4 In the Name of Request field, type a descriptive name for the request.
- 5 In the Description field, type a brief description of the request.
- 6 Click Save.



## **Saving Siebel Analytics Reports to a Lotus Notes Database**

There are two approaches to adding Siebel Analytic reports to a Lotus Notes database:

- Save the report to a Web archive file (file extension .mht), and then upload the file to the Lotus Note database.
- Schedule the report using Siebel Delivers to be emailed automatically to a specific address on a Lotus Notes server. The Lotus Notes server can then process the email and write it to the database.

## **Running a Saved Request in Siebel Answers**

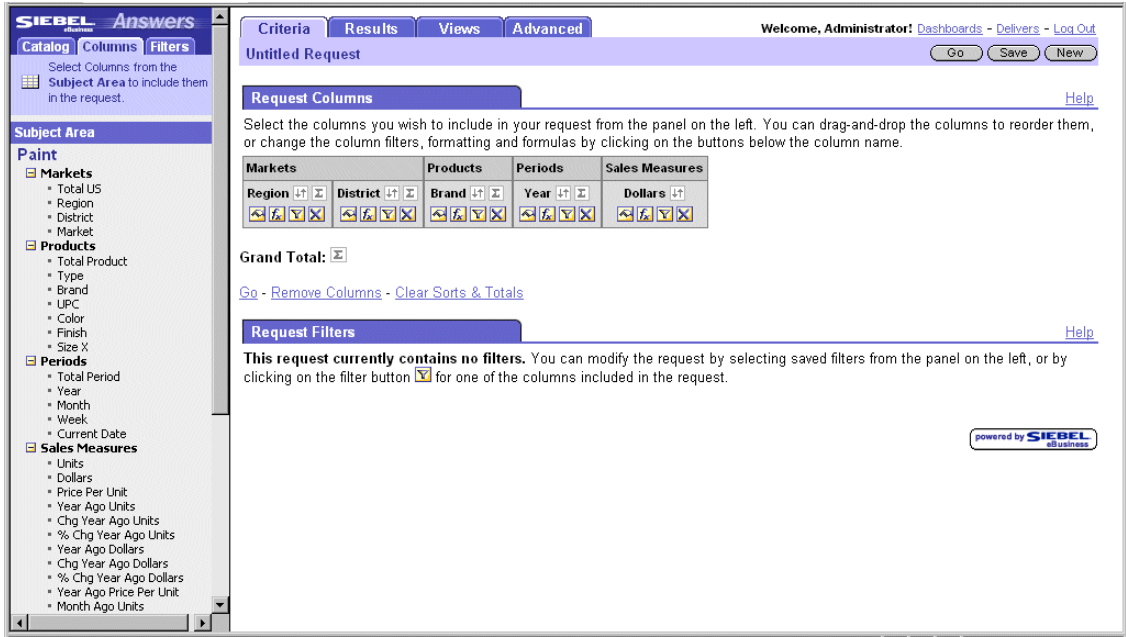
You can access and run saved requests in Siebel Answers.

### ***To run a saved request in Siebel Answers***

- 1** Navigate to Siebel Answers.
- 2** In the selection pane, click the Catalog tab.
- 3** In the Catalog area, expand the folders to display the saved requests.
- 4** Click a request to display it in the Results view.







### Working with Request Columns in Siebel Answers

The Criteria tab shows the columns that are included in a request. As shown in [Figure 6](#), when you select items from a subject area to create a request, the selected items appear in the Request Columns area at the top of the Criteria tab. Just below the Request Columns header are column criteria boxes for each column added to the request. Each box contains two sections. The top section shows the name of the subject area. The bottom section shows the name of the column and several request column icons, which you can click to view or modify the properties of the column.



**Figure 6. Request Columns Area Example**

**Table 5. Siebel Answers Request Column Icons**

Icon	Description
	<p><b>Order By.</b> Specifies the order in which results should be returned, ascending or descending. You can order results by more than one column. If you choose more than one column, the order is shown on this icon.</p> <p>Different images appear on the icon, depending on the selected sort order. This example shows two arrows side by side, one pointing up, the other pointing down. For information about the forms an Order By icon can take, see <a href="#">Table 6 on page 54</a>.</p>
	<p><b>Total By.</b> Creates subtotals for one or more columns in the request. The icon displays the image of a mathematical sum symbol.</p>
	<p><b>Format Column.</b> Changes the formatting and heading for the selected column. The icon displays the image of a hand with its index finger pointing to the left and down.</p>
	<p><b>Edit Formula.</b> Changes the column heading and the formula for the column, such as adding a Rank or Percentile function. The icon displays the image of a lowercase, italic fx.</p>
	<p><b>Filter By Column.</b> Creates or edits a filter for the column. You can also click the Filters tab in the selection pane. The icon displays the image of a funnel.</p>
	<p><b>Remove Column.</b> Deletes the column from the request. The icon displays the image of an uppercase X.</p>

## Using Column Selectors in Siebel Answers Requests

A column selector control allows you to dynamically change which specific columns are displayed in a single report query. This is also known as dimensional prompting. Users with access to the report can view the retrieved data along several different dimensions. For example, users can review several demographic attributes about a particular group of people by scrolling through a drop-down list and making selections.

One column selector can be attached to each column in a specific query, and multiple database columns (attributes) can be attached to each column selector.

#### ***To create or modify a column selector in Siebel Answers***

**1** In Siebel Answers, navigate to the Views tab in the right pane.

**2** Click the Column Selector link.

The Add/Edit Column Selector screen appears.

**3** Check the option Include Prompt box for each column that you want a column selector to display.

**4** Type a label for the selector.

If you do not type a label, users viewing this report will not see a title on the selector.

**5** From the subject area in the selection pane, select the columns you want in the selector.

**6** If you want to remove a specific attribute from a column selector, click the Delete icon.

**7** Click Finished to save the column selector.

## **Modifying Columns in Siebel Answers**

In Siebel Answers, you can modify the columns in saved requests to which you have access.

#### ***To reorder the columns in a Siebel Answers request***

**1** In Siebel Answers, create or load a request.

**2** In the Request Columns area in the right pane, drag and drop a column name from its current location to another location.

The columns appear in the new order.

**3** To see the results with the new column order, click Go.

***To add columns to a Siebel Answers request***

- 1** Display a request to which you want to add columns.
- 2** In the subject area in the selection pane, expand the folders to display the available columns.
- 3** Select a column to add to the request.
- 4** Continue adding columns to the request as needed.
- 5** If you want to see the results, click the Results tab.

You can then save the request.

***To delete a column from a Siebel Answers request***

- 1** In Siebel Answers, load a request.
- 2** In the right pane, click the Criteria tab.
- 3** In the Request Columns area, click the Remove Column icon for the column you want to remove.

The selected column is removed from the Request Columns section.

## **Updating a Siebel Answers Request**

In Siebel Answers, you can update saved requests to which you have access. To update a request, you load the saved request, modify it, and save it, using the same name as the original request. When you update a request, all dashboards, views, and reports that use the request are also updated.

***To update a Siebel Answers request***

- 1** In Siebel Answers, load the request you want to update.
- 2** In the right pane, modify the request as needed.
- 3** Click Save.

The Save Request page appears.

- 4 Click Save.  
The Confirm Item Replace page appears.
- 5 Click Yes to overwrite the old request.

Sorting Columns in Siebel Answers




In Siebel Answers, you can set the sort order for one or more columns that appear in a request. When you click the Order By icon, it shows a new image to indicate the sort order that the selected column will apply to the results.

To sort a request based on columns in Siebel Answers



- 1 In Siebel Answers, create or load a request.
- 2 Click the Order By icon for the column you want to sort by.  
The icon changes to indicate the sort order.
- 3 Continue clicking the Order By icon until the sort order you want appears.

Table 6 describes the available sort orders and the images on the Order By icon that represent them.

Table 6. Forms of the Siebel Answers Order By Icon

Form	Description
	The image of two arrows—one pointing up, the other pointing down—indicates that the selected column will not be used to sort the results.
	The image of an up arrow indicates that the results will be sorted in ascending order, using the items in the selected column.
	<p>A number that appears on an Order By icon indicates that the column is not the primary sort column applied to the results. The number corresponds to when the sort order is applied.</p> <p>In this example, which shows an up arrow with the number two, the column is used as the second sort order column. The up arrow indicates that the results are sorted in ascending order, using the items in the selected column.</p>

**Table 6. Forms of the Siebel Answers Order By Icon**

Form	Description
	The image of a down arrow indicates that the results will be sorted in descending order, using the items in the selected column.
	<p>A number that appears on a Order By icon indicates that the column is not the primary sort column applied to the results. The number that appears corresponds to when the sort order is applied.</p> <p>In this example, which shows a down arrow with the number two, the column is used as the second sort order column. The down arrow indicates that the results are sorted in descending order, using the items in the selected column.</p>

## Adding Column Totals in Siebel Answers

In Siebel Answers, you can create one or more column subtotals that appear in the results. The selected column is used to create a new row in the results that shows a subtotal based on each unique value in the column.

You can also add a row to a request that shows the grand total for the numeric columns. The Grand Total icon appears in the Request Columns area of the Criteria page.

### ***To add column and row grand totals to a request in Siebel Answers***

- 1** In Siebel Answers, create or load a request.
- 2** Click the Totals icon for the column to be totaled.

### ***To add a grand total to a request in Siebel Answers***

- 1** In Siebel Answers, create or load a request.
- 2** In the Request Columns area, click the Grand Total icon.

## Integrating a Siebel Analytics Request with Microsoft Excel's Internet Query Feature

Integrating a Siebel Answers data request with Excel's Internet Query (IQY) feature allows you to run the request from within Excel. This can be useful for printing and report distribution.

When the IQY file is opened in Excel, you are prompted to enter your Siebel Analytics user ID and password. (You must have a nonblank password.) Then, the results of the saved request are retrieved and placed in an Excel spreadsheet. You can save the Excel spreadsheet so that the data can be refreshed directly from within Excel.

By default, Excel prompts you to enter your user ID and password each time the query is refreshed. Alternatively, you can save your user ID and password within the spreadsheet. Consult your Excel documentation for details.

---

**NOTE:** You can integrate requests into Excel's IQY feature only with results that are displayed in one or more table or pivot table views. Other view types are not supported.

---

### ***To integrate a Siebel Analytics request with Excel's IQY feature***

- 1** Save a request with one or more table or pivot table views.
- 2** Navigate to the Advanced tab in Siebel Answers and select the third link shown on the Advanced tab.

This is the link to download the request in Excel IQY format.

- 3** Save the file to the desired location.

After opening the file in Excel, you can modify it, specify additional formatting, enhance it with charts, and so on. For information, see your Excel documentation.



## **Formatting Requests in Siebel Answers**

# **4**

This chapter explains how to format requests. After you run a request, the results are formatted using default formatting rules. By adding additional formatting to the results, you can help focus on blocks of related information and call attention to specific data elements.

# Using Formatting Functions in Siebel Answers

You can use the formatting functions in Siebel Answers to change the following properties of a request:

- Heading titles
- Data names
- Text formatting
- Request labels

**To format a request in Siebel Answers**

- 1 Display a request to which you want to add formatting.

**NOTE:** For more information about displaying or creating a request, see [Chapter 3, “Working with Requests in Siebel Answers.”](#)

- 2 Click the Format Column icon for the column you want to format.

The Edit Column Format screen appears.

- 3 Complete the fields. Fields are shown in [Table 7](#).

- 4 Click Finished.

**Table 7. Siebel Answers Column Formatting Option Fields**

Field	Description
Table Alias (Heading)	Type the name you want to display in the results. To access this field, you must select the Custom Headings option. The heading name you specify affects only the selected column. Other columns in the same subject area are unaffected.
Column Alias	Type the column heading name you want to display for the column. To access this field, you must select the Custom Headings option.
Custom Headings	When selected, indicates that the custom headings you type for the column will be used in the results. When cleared, indicates that the original headings associated with the column will be used.

**Table 7. Siebel Answers Column Formatting Option Fields**

Field	Description
Visibility	<p>Indicates whether to display the column in the results. You can add multiple columns to a request to help sort, total, and format the data within the results; however, those columns do not have to be displayed.</p> <p>You can display only those columns with data that you need. By default, all columns are set to Display when they are added to a request. Columns that are hidden are still used by the request; however, they do not appear in the results.</p>
Alignment	Aligns the column values to the left, center, or right of the table cells.
Vertical Alignment	Aligns the column values at the top, middle or bottom of the table cells.
Text	Select a text color to display for the column values in the results.
Background	Select a background color to display for the column in the results.
Style	Select a font style to display for the column values in the results.
Labels	<p>Indicates whether to suppress or repeat repeating data for every row in a request. Select Suppress to display repeating data only once and suppress duplicate rows. Select Repeat to display repeating data for every row. Select Default to retain the default label display characteristics.</p> <p>The data in one column of a table may be repeated in relation to rows of data in other columns in the table. For example, if one column lists customer names and another column lists the states those customers are in, the state data could be repeated for each customer row. You can display duplicate data only once, or to display it for every row. Displaying duplicate data only once can make a table easier to read, and can make distinctions in that data more apparent.</p>
Aggregation Rule	Select the aggregate rule to apply to this column. The selections reflect any related formula already associated with this column.

**Table 7. Siebel Answers Column Formatting Option Fields**

Field	Description
Use Default Data Format	<p>You can control the way your data is displayed by overriding the default display characteristics. The selections that are available are based on the data type in the column.</p> <p>For example, if a column contains numeric data, the type choices may include Number, Currency (\$), or Percentage (%). You can then choose the number of decimal places to display and how to display negative numbers. If a column contains text, you can treat that text as Plain text, HTML, MailTo address, HyperText Link, and Image URL.</p> <p>Based on your selection, the Custom Text Format box shows the HTML string used to display the data.</p>
Treat Text As	<p>Select the type of data format to apply to the column values. To access this field, you must clear the Use Default Data Format check box.</p>
Custom Text Format	<p>To access this field, you must clear the Use Default Data Format check box and select Custom Text Format in the Treat text as drop-down list.</p> <p>Use this field to type a custom formatting string. You can type HTML calls that provide special formatting. You can also type any valid HTML string, including JavaScript, VBScript, and so on.</p> <p>For example, typing HTML such as the following allows you to control the column width and height in tables and pivot tables:</p> <pre>[html]&lt;span style="width:200px" style="height:50px"&gt;@&lt;/span&gt;</pre> <p>If you do not know HTML, JavaScript, VBScript, and so on, you can consult a third-party reference.</p>
Use These Settings	<p>By default, column format settings apply only to the current request; however, you can apply settings to other requests by selecting an option in this field. The options that appear are controlled by the privileges assigned to you by your Siebel Administrator.</p>

## Adding Conditional Formatting in Siebel Answers

In tables and pivot tables, conditional formatting helps direct attention to a data element if it meets a certain threshold. For example, you can show below-quota sales figures in the color red, or display an image such as a trophy next to the name of each salesperson who exceeds quota by a certain percent.

You do this by configuring a request to compare the values of a selected column to a constant or to a variable, and then setting up conditional formatting rules to apply to the data when the condition evaluates to true. The conditional formats can include colors, fonts, images, and so on, for the data and for the table cell that contains the data.

You can add multiple conditions so that the data and the table cell are displayed in one of several formats, based upon the value of the data. For example, below-quota sales can be displayed in the color red, and above-quota sales can be displayed in the color green.

Several subtle conditional formatting differences exist between traditional tables and pivot tables. Conditional formats that format one column based on the value of another column are not reflected in a pivot table, but are reflected in the table view. For example, setting the color of a region name based on the sales in that region has no effect in a pivot table. However, setting the color of the sales data based on the value of the sales data is reflected in a pivot table, as is setting the color of the region name based on the actual name; for example, displaying a value of Eastern Region in bold red text.

---

**NOTE:** In pivot tables, conditions are evaluated against the values as calculated or aggregated by the pivot table. Conditional formatting is applied based on the underlying value, even if you choose the Show As options to show the data as percents or indexes. For more information about pivot tables, see [“Working with Siebel Analytics Pivot Table Views” on page 99](#).

---

#### **To add conditional formatting to a request in Siebel Answers**

- 1 Create or display a request to which you want to add conditional formatting.

---

**NOTE:** For more information about creating and displaying a request, see [Chapter 3, “Working with Requests in Siebel Answers.”](#)

---

- 2 Click the Format Column icon for the column you want to format.

The Edit Column Format page appears.

- 3 Click the Conditional Formatting link.

---

**NOTE:** The Conditional Formatting link is located below the text formatting options in the middle of the page.

---

The Conditional Formatting page appears.

Any existing conditional formats for columns in the request are displayed at the top of the page.

---

**NOTE:** Conditional formats are evaluated in the order in which they are shown. To reorder a condition, click the up or down arrow button. To delete a condition, click the Delete icon.

---

- 4 Complete the formatting options for the column. Formatting options are described in [Table 8 on page 63](#).

- 5 Click the Add Condition link to add your selections as a new condition.

New conditions are shown at the top of the page.

---

**NOTE:** To update a condition shown at the top of the page, click it. The condition is highlighted, and the formatting options are updated to show the conditional format options for the column. Make your changes, and then click the Update Selected Condition link.

---

- 6 Click Finished to return to the Edit Column Format page.
- 7 Click Finished again to exit the Edit Column Format page.
- 8 View the results in a table or pivot table view.

**NOTE:** For information about views, see [Chapter 6, “Working with Siebel Analytics Views.”](#)

**Table 8. Siebel Answers Conditional Formatting Options**

Option	Description
Images Left	Displays any images to the left of the column data. (You can specify an image in the graphics selection pane at the bottom of the Edit Column Format page.)
Images Right	Displays any images to the right of the column data.
Include formatted column values	<p>Select this option to include the column data in the results display, together with any conditional formatting.</p> <p>If you want to show only the conditional formatting for the column, do not select this option. This does not hide the column itself in the results.</p> <p><b>Example.</b> The following is an example of showing only conditional formatting for the column in the results.</p> <p>Suppose the request includes ten ranking categories, with a value of 1 in the column indicating the worst ranking, and a value of 10 indicating the best ranking. You might apply conditional formatting to show the following:</p> <ul style="list-style-type: none"> <li>■ A red image to indicate a low rank for columns that contain 1, 2, or 3</li> <li>■ A yellow image to indicate an average rank for columns that contain 4, 5, 6, or 7</li> <li>■ A green image to indicate a high rank for columns that contain 8, 9, or 10</li> </ul> <p>Then, make sure the option to include formatted column values is not checked. In the results display, the columns appear with only the images, and not the ranking numbers.</p>

**Table 8. Siebel Answers Conditional Formatting Options**

Option	Description
Criteria	Use this to specify the condition that must be met in order for the conditional formatting to be applied. Select the column and condition from the drop-down lists, and type the comparison value into the text box.
Format	Use this to specify a text color, a style, and a table cell background color for the column. Make your selections from the drop-down lists.
Graphics	<p>Use this to specify whether to include an image in the column:</p> <ul style="list-style-type: none"><li>■ Click the No Image option if you do not want to include an image.</li><li>■ To include a custom image, click the Custom Image option and specify the appropriate path in the text box. The image should be one that is accessible to all users who will view the request results.</li><li>■ To include one of the images distributed with Siebel Answers, use the graphics selection pane at the bottom of the page. The left side shows the categories of images that are available, such as meters and trend arrows. When you click on an image category, the right side shows the images that are available in that category. Make your selection by clicking the radio button next to the image.</li></ul>



## Using Custom Date/Time Format Strings in Siebel Answers

Custom date/time format strings provide additional options for formatting columns that contain timestamps, dates, and times. These are the kinds of custom format strings:

- [“Siebel Answers General Custom Format Strings” on page 66](#)
- [“Siebel Answers ODBC Custom Format Strings” on page 67](#)
- [“Siebel Answers Custom Format Strings for Integral Fields” on page 68](#)
- [“Siebel Answers Custom Format Strings for Conversion into Hours” on page 69](#)
- [“Siebel Answers Custom Format Strings for Conversion into Hours and Minutes” on page 70](#)
- [“Siebel Answers Custom Format Strings for Conversion into Hours, Minutes, and Seconds” on page 71](#)

You can type these custom format strings on the Edit Column Format screen.

### **To enter a custom date/time format string in Siebel Answers**

- 1** From the Criteria tab in Siebel Answers, click the Format Column icon for a column that contains a timestamp, a date, or a time.
- 2** The Edit Column Format screen appears.
- 3** Clear the option Use Default Data Format near the bottom of the screen.
- 4** Make sure that the option Custom Date Format is selected in the Date/Time Format field.
- 5** In the Custom Date Format field, type the custom format string exactly as shown in the following tables, including left and right bracket characters ([ ]).

---

**NOTE:** You must type the custom format string into the Custom Date Format field. Custom format strings are not available for selection from the drop-down list.

---

## Siebel Answers General Custom Format Strings

Table 9 shows the general custom format strings and the results they display. These allow the display of date/time fields in the user's locale.

**Table 9. General Custom Format Strings**

General Format String	Result
[FMT:dateShort]	Formats the date in the locale's short date format. You can also type [FMT:date].
[FMT:dateLong]	Formats the date in the locale's long date format.
[FMT:dateInput]	Formats the date in a format acceptable for input back into the system.
[FMT:time]	Formats the time in the locale's time format.
[FMT:timeHourMin]	Formats the time in the locale's time format but omits the seconds.
[FMT:timeInput]	Formats the time in a format acceptable for input back into the system.
[FMT:timeInputHourMin]	Formats the time in a format acceptable for input back into the system, but omits the seconds.
[FMT:timeStampShort]	Equivalent to typing [FMT:dateShort] [FMT:time]. This formats the date in the locale's short date format and the time in the locale's time format. You can also type [FMT:timeStamp].
[FMT:timeStampLong]	Equivalent to typing [FMT:dateLong] [FMT:time]. This formats the date in the locale's long date format and the time in the locale's time format.
[FMT:timeStampInput]	Equivalent to [FMT:dateInput] [FMT:timeInput]. This formats the date and the time in a format acceptable for input back into the system.
[FMT:timeHour]	Formats the hour field only in the locale's format, such as 8 PM.

### Siebel Answers ODBC Custom Format Strings

Table 10 shows the ODBC standard typed custom format strings and the results they display. These display date/time fields according to the ODBC standard.

**Table 10. ODBC Custom Format Strings**

ODBC Format String	Result
[FMT:dateODBC]	Formats the date in standard ODBC yyyy-mm-dd format (4-digit year, 2-digit month, 2-digit day).
[FMT:timeODBC]	Formats the time in standard ODBC hh:mm:ss format (2-digit hour, 2-digit minute, 2-digit second).
[FMT:timeStampODBC]	Equivalent to typing [FMT:dateODBC] [FMT:timeStampODBC]. This formats the date in yyyy-mm-dd format, and the time in hh:mm:ss format.
[FMT:dateTyped]	Displays the word <i>date</i> and then shows the date, in standard ODBC yyyy-mm-dd format. The date is shown within single quote characters (').
[FMT:timeTyped]	Displays the word <i>time</i> and then shows the time, in standard ODBC hh:mm:ss format. The time is shown within single quote characters (').
[FMT:timeStampTyped]	Displays the word <i>timestamp</i> and then the timestamp, in standard ODBC yyyy-mm-dd hh:mm:ss format. The timestamp is shown within single quote characters (').

Siebel Answers Custom Format Strings for Integral Fields

Table 11 shows the custom format strings that are available when working with integral fields. These allow the display of month and day names in the user’s locale.

Integral fields hold integers that represent the month of the year or the day of the week. For months, 1 represents January, 2 represents February, and so on, with 12 representing December. For days of the week, 1 represents Sunday, 2 represents Monday, and so on, with 7 representing Saturday.

Table 11. Format Strings for Integral Fields

Integral Field Format String	Result
[MMM]	Displays the abbreviated month name in the user’s locale.
[MMMM]	Displays the full month name in the user’s locale.
[DDD]	Displays the abbreviated day of the week in the user’s locale.
[DDDD]	Displays the full day of the week in the user’s locale.

## Siebel Answers Custom Format Strings for Conversion into Hours

Table 12 shows the custom format strings that can be used to format data into hours. These can be used on the following kinds of fields:

- Fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).
- Fields where the output is in [FMT:timeHour] format, described in Table 9 on page 66. (This format displays the hour field only in the locale's format, such as 8 PM.)

**Table 12. Format Strings for Conversion into Hours**

Data Conversion Format String	Result
[FMT:timeHour]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and formats the number of hours into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 2 AM, and a value of 12.24 as 12 PM.
[FMT:timeHour(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and formats the number of minutes into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 12 AM, and a value of 363.10 as 06 AM.
[FMT:timeHour(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and formats the number of seconds into an hh display, where hh is the number of hours. Fractional hours are dropped from the value. For example, a value of 600 is formatted as 12 AM, a value of 3600 as 1 AM, and a value of a value of 61214.30 as 5 PM.

Siebel Answers Custom Format Strings for Conversion into Hours and Minutes

Table 13 shows the custom format strings that can be used to format data into hours and minutes. These can be used on fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).

They can also be used where the output is in [FMT:timeHourMin] format, described in Table 9 on page 66. (This format displays the time in the locale’s time format, but omits the seconds.)

Table 13. Format Strings for Conversion into Hours and Minutes

Data Conversion Format String	Result
[FMT:timeHourMin]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 12 is formatted as 12:12 AM, a value of 73 as 1:13 AM, and a value of 750 as 12:30 PM.
[FMT:timeHourMin(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 60 is formatted as 12:01 AM, a value of 120 as 12:02 AM, and a value of 43200 as 12:00 PM.
[FMT:timeHourMin(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the number of hours into an hh:mm display, where hh is the number of hours and mm is the remaining number of minutes. For example, a value of 0 is formatted as 12:00 AM, a value of 1.5 as 1:30 AM, and a value of 13.75 as 1:45 PM.

### Siebel Answers Custom Format Strings for Conversion into Hours, Minutes, and Seconds

Table 14 shows the custom format strings that can be used to format data into hours, minutes, and seconds. These can be used on fields that contain integers or real numbers that represent time.

They can also be used where the output is in [FMT:time] format, described in “[Siebel Answers General Custom Format Strings](#)” on page 66. (This format displays the time in the locale’s time format.)

**Table 14. Format Strings for Conversion into Hours, Minutes, and Seconds**

Data Conversion Format String	Result
[FMT:time]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 12:01:00 AM, a value of 126 as 12:02:06 AM, and a value of 43200 as 12:00:00 PM.
[FMT:time(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 1:00:00 AM, a value of 126 as 2:06:00 AM, and a value of 1400 as 11:20:00 PM.
[FMT:time(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 6.5 is formatted as 6:30:00 AM, and a value of 12 as 12:00:00 PM.





## **Filtering Requests in Siebel Answers**

# **5**

This chapter explains how to filter requests.

## Overview of Filters in Siebel Answers

A filter is used to limit the results that appear when a request is run. Based on the filter criteria that you define, Siebel Answers shows only those results that match your criteria.

For example, you may have a request that searches for your clients and their contract amounts. You can use a filter to limit the results of the request so that only the top 10 clients appear in the results.

Together with the columns you select, a filter determines what your results will contain. Filters are applied on a column-level basis. A filter can also combine other filters to further constrain the results of a request. Another kind of filter, called a global filter, applies to all items in a dashboard.

## Procedures for Using Filters in Siebel Answers

This topic explains how to work with filters:

- [“Creating Filters in Siebel Answers”](#)
- [“Saving Filters in Siebel Answers” on page 76](#)
- [“Creating a Global Filter in Siebel Answers” on page 78](#)
- [“Modifying Filters in Siebel Answers” on page 81](#)
- [“Removing Filters in Siebel Answers” on page 81](#)

### Creating Filters in Siebel Answers

This topic explains how to create a filter.

#### **To create a filter in Siebel Answers**

- 1 Display a request to which you want to add a filter.
- 2 In the right pane, click the Criteria tab.
- 3 Click the Filter icon in the column with the values that will be used as criteria for the filter.

The Create/Edit Filter page appears.

- 4 Enter the filter criteria:
  - a In the Operator drop-down list, select an operator.

---

**NOTE:** A comparison operator is used to compare each value in the specified column with other values that you specify. If the statement evaluates to true, the filter retains records with values in the specified column that meet the filter criteria. It filters out records with values that do not meet the filter criteria, and does not display these records in the results.

---

- b** In the Value text box, do one of the following:
    - ☐ Enter the value to which you want to compare the column values.
    - ☐ Select a value in the Filter Choices area.
  - c** You can also compare the values of the column to an expression. To include an additional value in the filter criteria, click the Add Another Value link, and repeat [Step a on page 75](#) and [Step b](#).
- 5** Click Finished.
- 6** After you create a filter, you can perform the following functions:
- To save the filter, click Save and complete the fields.
  - To combine another filter with the existing filter, repeat [Step 3 on page 75](#) through [Step 5](#).
  - To remove a filter, click the Remove link for the filter you want to remove.
  - To display your results, click the Results tab.

## Saving Filters in Siebel Answers

This topic explains how to save a filter.

### ***To save a filter in an existing folder in Siebel Answers***

- 1** Create or edit a filter.
- 2** In the Request Filters area on the Criteria tab, click the Save Filter link at the bottom of the page.

The Save Filter page appears.
- 3** In the Save Filter in Folder drop-down list, select the folder in which to save the filter.
- 4** In the Name of Filter text box, type the name of the filter.
- 5** Click Save Filter.

***To save a filter in a new folder in Siebel Answers***

---

**NOTE:** The folders used to store filters are not the same folders used to store saved requests.

---

- 1** Create or edit a filter.
- 2** In the Request Filters area on the Criteria tab, click the Save Filter link at the bottom of the page.  
  
The Save Filter page appears.
- 3** Click the Create New Folder link.  
  
The Create Filter Folder page appears.
- 4** In the Group Folder drop-down list, select the group in which to add the new folder.
- 5** In the Subfolder text box, type the name of the new folder.
- 6** Click Create Folder.  
  
The Save Filter page appears.
- 7** In the Save Filter in Folder drop-down list, select the folder in which to save the filter.
- 8** In the Name of Filter text box, type the name of the filter.
- 9** Click Save Filter.

## Creating a Global Filter in Siebel Answers

If you have the appropriate permissions, you can create a global filter for use in exercising dashboard-wide control over requests that are embedded into a dashboard page. To do this, you define prompts for values to be used to filter all requests on the dashboard page, in the current context.

Global filters act as an independent control for the entire dashboard, and can update any report on that dashboard that shares columns with the global filter. The column needs to be filtered based on a specified value or the Is Prompted option, as described in “Creating Filters in Siebel Answers” on page 75.

Global filters are typically built by creating a new report. You can define the columns and operators for the global filter, and specify how users who view the report select the global filter values. You can also remove a column from an existing global filter.

A sample construction for a global filter is shown in Figure 7.

**SIEBEL Answers**

**Add/Edit Global Filter** [Help] [Finished]

Prompts for values which filter all results on the current Dashboard page. Pressing [cancel](#) will return you to the previous screen.

Caption:

Description:   
(You can include HTML tags in the description such as <b>, <center>, <font>, <object>, <table>, and so on.)

**Prompts**

Select a column from the left panel to add a column prompt to the global filter, and then make choices below. Checking the "Group" checkbox will cause subsequent controls to be drawn in a new line.

Group	Column	Operator	Control	Show	Default to	Label
<input type="checkbox"/>	District	is equal to / is in	Drop-down List	All Values	Report Defaults	
<input type="checkbox"/> (All Choices)						
<input checked="" type="checkbox"/>	Type	is equal to / is in	Drop-down List	All Values	All Choices	
<input checked="" type="checkbox"/> (All Choices)						

Pressing [cancel](#) will return you to the previous screen. [Finished]

Figure 7. Sample Construction for a Global Filter

Figure 8 shows how the sample global filter shown in Figure 7 on page 78 appears as one or more prompts, at the top of the screen on the dashboard page. The user's selections from the prompts determine the content of the reports embedded in the dashboard page.



**Figure 8. How a Global Filter Looks in a Dashboard**

**To create or modify a global filter in Siebel Answers**

- 1** In Siebel Answers, select the subject area that contains the column to use as the filter.
- 2** Navigate to the Views tab in the right pane.
- 3** Click the Global Filter link.
- 4** Type the caption for the global filter prompt in the Caption box.  
You can include HTML markup tags such as `<b>`, `<center>`, `<font>`, `<table>`, and so on, in the caption.
- 5** (Optional) Type a description in the Description box.

---

**NOTE:** It is recommended that you supply a description. Descriptions are displayed when Web Administrators use the Catalog Manager.

---

- 6** Select the column to use as the filter from the subject area in the selection pane. You can select any number of columns.

---

**NOTE:** The number of columns you include in the filter can affect performance. For example, columns that present drop-down values require a request to the Siebel Analytics Server to populate. In general, it is recommended that you limit the number of columns to nine or less.

---

To remove a column from the filter, click the Delete icon for that column.

- 7** Select the operator to use from the Operator drop-down list.

- 8** Select the Control type to use to select specific filter values.

The choices are Calendar Applet, Drop-Down List, and Edit Box (Free From Text).

- 9** If you chose Drop-Down List, in the Show list, indicate what values you want to appear in the drop-down list.

You can show all values or develop an SQL statement to limit the drop-down list to certain values.

- 10** In the Default to list, choose the value that you want the control element to default to initially.

This is what users viewing the report will see initially. You can show the report defaults, all choices, or a specific value. If you select a specific value, a field appears in which you can type the value.

- 11** In the Label box, you can type a name to use for the filter label.

If you leave the Label box empty, the column label is used as the filter label.

- 12** When multiple columns are included, you can reorder them by clicking the Order By icons.

This controls the order in which selectors are displayed.



- 13** If you want the selected prompt and all other prompts below it to be displayed on a new line in the filter, click the box in the Group list.
- 14** When you are done, click Finished.

## **Modifying Filters in Siebel Answers**

When you create or modify a filter, you can use the Filter Choices form to help select the values you will specify as filter criteria. For example, you may want to filter several records from the results, but you cannot remember the range of values that appear in the selected column without looking at the request results. You can use the Filter Choices form to display the values from the selected column and then select which values to add to the filter criteria.

This feature is useful for limiting lengthy lists. For example, suppose you want to see results for the state of Alaska. You could type an A into the Match text box, and the Limited Choices list will show only the values that begin with the letter A. If you have set other constraints in the filter, the list will show only the choices within those constraints.

### ***To modify a filter in Siebel Answers***

- 1** Display the request that contains the filter to edit.
- 2** In the Request Filters area, click the Edit link for the filter.
- 3** Make your changes to the filter definition.
- 4** Click Finished.

## **Removing Filters in Siebel Answers**

This topic explains how to remove filters from a request.

### ***To remove a filter from a request in Siebel Answers***

- 1** Display a request that uses a filter.
- 2** Select the filter to remove, and click the Remove link for that filter.

The Request Filters area shows the updated list of filters for the request.

### **To remove all filters from a request in Siebel Answers**

- 1 Display a request that uses a filter.
- 2 Click the Remove Filters link.

All filters associated with the request are removed.

## **Using Dynamic Filters in Siebel Answers**

Filters can be combined with other filters, or they can be based on the values returned by another request. Such filters are called subfilters. You can select any saved request that returns columns of values and use any values in that request to filter the selected column in another request. The saved request can also reference a different subject area.

### **To base a filter on results of another request in Siebel Answers**

- 1 Display a request to which you want to add a filter.
- 2 Select the column to use as criteria for the filter, and click the Filter icon.

The Create/Edit Filter page appears.

- 3 In the Additional Options section, click the Filter based on results of another request link.

The Filter Saved on Request page appears. The name of the column to be filtered appears in the Column box.

- 4 If this is not the table and column to be filtered, specify a different table and column.
- 5 In the Relationship drop-down list, select a relationship.

---

**NOTE:** The relationship you choose is used to compare each value in the specified column with a group of values from another request that you specify.

---

- 6 To navigate to a saved request, do one of the following:
  - Click the link Select Request from Catalog.
  - Enter the complete path to the saved request directly in the Saved Request box.

---

**NOTE:** If the saved request contains a matching column name, it appears as the default in the Use Values in Column drop-down list.

---

- 7 In the Use values in Column drop-down list, select the column from which to use values in the filter definition.
- 8 Click Finished.

## Editing SQL Statements for Filters in Siebel Answers

This topic explains how to access and edit the SQL statements that make a filter work.

### ***To display the SQL generated for a filter in Siebel Answers***

- 1 Display a request that uses a filter.
- 2 In the right pane, click the Advanced tab.

The proposed SQL for the request appears.

---

**NOTE:** Advanced users and developers can use the section Advanced SQL Clauses near the bottom of the Advanced tab to specify specific GROUP BY, HAVING, and DISTINCT clauses to include in the SQL issued to the Siebel Analytics Server.

---

If you want to edit the SQL Where clause, click the Criteria tab and use the instructions in Editing SQL to edit the SQL generated for the filter.

### ***To edit the SQL generated for a filter in Siebel Answers***

- 1** In the Request Filters area on the Criteria tab, click the Edit link.

The Create/Edit Filter page appears.

- 2** In the Additional Options area (just below the Filter Definition area), click the Convert this filter to SQL link.

The Advanced SQL Filter page appears.

- 3** Type your modifications into the text box.

- 4** Click Finished.

## **Working with Siebel Analytics Views**

# **6**

This chapter describes how to create and modify Siebel Analytics views. Views allow you to associate multiple elements with the results of a request. For example, you may choose to show a report's results in a pie chart and in a pivot table, then add a title, a graphic such as a product logo, and explanatory text. Each of these elements is a view.

## About Siebel Analytics Views

Views use the presentation capabilities of Siebel Analytics Web to help you look at data in meaningful, intuitive ways. Preparing multiple views of request results can help you pinpoint trends and relationships in data.

After creating a new request or executing a saved request, the results can be customized from the Results tab, or enhanced to include new views of the results data using the Views tab.

By default, Siebel Analytics displays results in a table with a title. It does this by including a Table view, which displays the results in a basic table, and a Title view, which displays the name of the saved request.

You can add additional views to your results, delete the current views and substitute different views, combine and position views anywhere on the page, and include any number of view types in the results. For example, you can create results that include side by side pivot tables that reflect different views of the data, charts that allow drilling down for more detailed information, and a list of filters that can be used to limit the results.

---

**NOTE:** Your permissions control whether you can access all views, or specific views only.

---

You can preview the results as you work with various views, and then save the request with the collection of views when you are finished. When the results are viewed in a dashboard, the view elements are presented as a coherent whole. If the request is embedded in a dashboard, the dashboard page can also include elements such as links to additional requests of interest, related graphics, or news stories.

## Types of Siebel Analytics Views

There are three categories of views that you can add to your results—result views, criteria views, and other views. [Figure 9](#) shows the Add View section on the Views tab, which you can use to select the type of view that you want to add to the results.



**Figure 9. Example Add Views Section on Views Tab**

The following topics describe the view types:

- “Siebel Analytics Result Views” on page 88
- “Siebel Analytics Criteria Views” on page 89
- “Siebel Analytics Other Views” on page 90

### Siebel Analytics Result Views

Result views control how the data is displayed. The default is to show the data in a table. After you have run a request, you can add other views to show the data in different ways. Result views include the following views:

- **Funnel Chart.** The Funnel Chart view displays a three-dimensional chart representing target and actual values using volume, level and color. It is useful for depicting target values that decline over time, such as a sales pipeline.

For information about working with funnel charts, see [“Working with Siebel Analytics Funnel Chart Views” on page 94.](#)

- **Narrative.** The Narrative view displays results as one or more paragraphs of text. You can type a sentence with placeholders for each column in the results, and specify how rows should be separated.

For information about working with narrative text, see [“Working with Siebel Analytics Narrative Views” on page 96.](#)

- **Nested Request.** The Nested Request view allows the results of another request to be included in the existing results view. You can select the request to include from the Web Catalog, and specify the view to use.

For information about working with nested requests, see [“Working with Siebel Analytics Nested Request Views” on page 98.](#)

- **Pivot Table.** The Pivot Table view allows you to take row, column, and section headings, and swap them around to obtain different perspectives of the data. Pivot tables are navigable and drillable. There are no restrictions on data placement. Elements can be placed in pages for an interactive result set, and can be formatted using custom formatters.

For information about working with pivot tables, see [“Working with Siebel Analytics Pivot Table Views” on page 99.](#)



- **Chart.** The Chart view allows you to drag and drop columns to a layout chart, and customize the title, legend location, axis titles and data labels. You can customize the size and scale of a chart, and control colors using a style sheet. Chart results are drillable.

Siebel Answers supports a variety of standard chart types, including bar charts, column charts, line charts, area charts, pie charts, and scatter charts. Custom chart subtypes include two-and-three-dimensional, absolute, clustered, stacked, combination, and custom.

For information about working with charts, see [“Working with Siebel Analytics Chart Views” on page 109](#).

- **Table.** The Table view allows you to perform in-depth analysis of the results data. Tables are navigable and drillable. You can customized the display to present a page of information at a time, which is convenient for larger result sets, and control the size of the page, and the position of the page control tape deck.

Tables are supported in a wide variety of formats and can include graphics, links, and so on, using custom formatters. You can also change the format of the table headings.

For information about working with tables, see [“Working with Siebel Analytics Table Views” on page 116](#).

- **Ticker.** The Ticker view displays the results of the request as a ticker or marquee, similar in style to the stock tickers that run across many financial and news sites on the Internet. You can control what information is presented and how it scrolls across the page. The Ticker view can include graphics and links, and supports a wide variety of formats.

For information about working with tickers, see [“Working with Siebel Analytics Ticker Views” on page 117](#).

## **Siebel Analytics Criteria Views**

Criteria views display the criteria used in the request. You can display the filters in effect for a request, the SQL generated for the request, and add a request title, subtitle, and customized graphics and buttons. Criteria views include the following views:

- **Column Selector.** The Column Selector view displays a set of controls that allow you to change which columns are displayed in a report.

For information about working with column selectors, see [“Using Column Selectors in Siebel Answers Requests” on page 51.](#)

- **Filters.** The Filters view allows you to display the filters in effect for the request. Filters may be unique to the request, or may be global in nature.

For information about working with filters, see [Chapter 5, “Filtering Requests in Siebel Answers.”](#)

- **Logical SQL.** The Logical SQL view allows you to display the SQL generated for the request. This is useful for trainers and Siebel Analytics Web Administrators. The Logical SQL view is generally not included in the results set for typical users.

You cannot modify this view, except to delete it.

- **Title.** Use the Title view to add a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the request.

For information about working with title views, see [“Working with Siebel Analytics Title Views” on page 92.](#)

## Siebel Analytics Other Views

Use the Other views to add text to the results. Users of the Siebel Marketing application can also create a segment within Siebel Marketing. Other views include the following views:

- **Static Text.** Use the Static Text view to add or edit markup text to the results. For more information, see *Analytics Web Online Help*.
- **Create Segment.** Use this view to display a Create Segment link in the results. Users can click this link to create a segment in the Siebel Marketing application, based on the results data.

---

**NOTE:** The Create Segment view is for use only by organizations that have the Siebel Marketing application.

---

## General Steps for Working with Siebel Analytics Views

This topic explains the general steps to use when working with views. For information about working with specific view types, see the remaining topics in this chapter.

### **To work with Siebel Analytics views**

- 1** Navigate to Siebel Answers.
- 2** Create a new request and save it, or execute a saved request.
- 3** Click the Views tab in Siebel Answers, or click Customize View on the Results tab.

---

**TIP:** Any time that you want to work with views on the Results tab instead of the Views tab, click Customize View.

---

- 4** Click the appropriate link for the type of view you want to work with.
- 5** To see what the result look like, click the Results tab. You can also click Show Results.
- 6** To position a specific view on the page on the Results tab, click the appropriate arrow icon.
- 7** To delete a view, click the Delete View icon for the view on the Results tab.
- 8** To edit the properties for a view, click the View Properties icon on the Results tab.
- 9** To preview the results using a style sheet:
  - a** Click Customize View on the Results tab.

A style drop-down list appears on the Results tab.
  - b** Choose a style from the drop-down list.

The style applies to all views in the result set. It shows what the result set would look like in a dashboard, using the selected style sheet.
- 10** When you are finished, click Save to save the result set.

## Working with Siebel Analytics Title Views

Use the title view to add a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results.

A blank title is always added to the results, as the first view.

### **To work with a title**

- 1** Navigate to Siebel Answers, and display the request with which you want to work.
- 2** In the right pane, click the Views tab.
- 3** In the Views area, click the Properties link for the title. (You can also click the View Properties icon for the title on the Results tab if you are customizing the view.)

The Add/Edit Title screen appears.

- 4** In the Title box, type the text to display as the title.

By default, the name of the request is displayed. For unsaved requests, the Title box is blank.

- 5** If you do not want the request name displayed, clear the Display Saved Name check box.
- 6** In the Subtitle box, type the text to display as a subtitle. This text displays below the actual title.

Adding a subtitle is optional.

- 7** If you want to provide a link to customized help or other information related to this request, type the appropriate URL in the Help URL box. The URL should be one that is accessible to all users who will view this request.
- 8** If you want to display a logo image or other graphic, specify the appropriate path in the Logo box. The image or graphic should be one that is accessible to all users who will view this request.
- 9** (Optional) If you want to display the date or time when the request started to execute, select one of the timestamp options from the drop-down list.

- 10** (Optional) If you want to display the date or time when the request finished executing, select one of the timestamp options from the drop-down list.
- 11** When you are done, click Finished.

## **Working with Siebel Analytics Static Text Views**

Use the static text view to add or edit markup text to the results. You can add markup text that contains formatted text, Active-X controls or Java scripts, sound bites, animation, specialized logos, and so on. The markup text may contain anything that is supported by the browser used to view the results.

If Siebel Delivers is enabled, you can select a format for the static text based on the expected delivery device. For example, if the results will go to a PDA, you can select WML (for Wireless Markup Language).

### **To work with static text**

- 1** Navigate to Siebel Answers, and display the request with which you want to work.
- 2** Click the Static Text link as the Other View in the Results tab or the Views tab, or click the View Properties icon in an existing static text view.

The Add/Edit Static Text screen appears.

- 3** Select a text format from the drop-down list.
- 4** Type the text, with the appropriate markup tags, in the Static Text box.

For examples, see *Analytics Web Online Help*.

- 5** When you are done, click Finished.

## Working with Siebel Analytics Funnel Chart Views

The Funnel Chart view shows results as a three-dimensional chart that represents target and actual values and levels by color. Typically, funnel charts are used to graphically represent data that changes over different periods or stages. For example, funnel charts are often used to represent volume of sales over a quarter.

Funnel charts are well suited for showing actual compared to targets for data where the target is known to decrease (or increase) significantly per stage, such as a sales pipeline. You can click on one of the colored areas to drill down to more detailed information.

After you have created a request, you can use the Views page to create a funnel chart.

### **To work with a funnel chart**

- 1** Navigate to Siebel Answers, and display the request with which you want to work.
- 2** In the right pane, click the Views tab.
- 3** In the Views area, click the Funnel Chart link.  
The Add/Edit Funnel Chart page appears.
- 4** Complete the fields. Some fields are described in [Table 15](#).
- 5** When you are done, click Finished.

After a funnel chart is created, you can save it in the Web Catalog.

**Table 15. Siebel Analytics Funnel Chart Fields**

Field	Description
Stage	The stage that is represented.
Actual Value	Specifies the actual value.
Target Value	Specifies the target value.

**Table 15. Siebel Analytics Funnel Chart Fields**

Field	Description
Target value for final stage only	Indicates whether the target value appears for the final stage only or for each stage in the chart.
Factor required to meet target	Identifies the factors required to meet targets.
Chart Title	Specifies the title that will display when the chart appears.
Minimum Threshold	Specifies the minimum threshold.
Maximum Threshold	Specifies the maximum threshold.
Size	Specifies the size.
Force standard shape and equal stage widths	Indicates whether Siebel Analytics will automatically force the display.
Interaction	Indicates the level of interaction allowed in the chart. Choices include None, Drill, and Navigate.

# Working with Siebel Analytics Narrative Views

The Narrative view displays the results as one or more paragraphs of text. You can type in a sentence with placeholders for each column in the results and specify how rows should be separated.

### **To work with narrative text**

- 1** Navigate to Siebel Answers, and display the request with which you want to work.
- 2** In the right pane, click the Views tab.
- 3** In the Views area, click the Narrative link.

The Add/Edit Narrative page appears.

- 4** Complete the fields. Fields are described in [Table 16 on page 97](#).

The following characters are reserved characters:

- @ (at sign)
- [ (left bracket)
- ] (right bracket)
- ' (single quote)
- \ (back slash)

If you want to include a reserved character, precede it with a backward slash character (\) to escape it. For example, to include a backward slash character in narrative text, type \\\.



- 5 When you are done, click Finished.

After narrative text is created, you can save it in the Web Catalog.

**Table 16. Siebel Analytics Narrative Text Fields**

Field	Comments
Select a format	Indicates the format for the narrative text. Choices include HTML, XML, WML, VXML, and Plain Text.
Prefix	Specifies the header for the narrative. This text appears at the beginning of the narrative.
Narrative	Indicates the narrative text in the that will display for each row in the results. Use "@ n" to include the results from the designated column in the narrative. For example, "@1" inserts the results from the first column in the narrative, while "@3" inserts the results of the third column.
Row Separator	Specifies a row separator tag. To use a separator other than the default for the format, clear the Use default row separator check box, and type the desired row separator in the Row Separator box.
Use default row separator	Connect x-y point values and display them as lines. Often used to show patterns and trends in data that is ordered by time.
Postfix	Specifies the footer text that appear at the bottom of the narrative. You can include markup tags in the postfix text box. Be sure your narrative ends in a row separator, or the footer begins with a row separator, to display the footer information on a separate line from the actual narrative.

## Working with Siebel Analytics Nested Request Views

The Nested Request view allows you to include the results of another request with your current request.

### **To create a nested request**

- 1** Navigate to Siebel Answers, and display the request with which you want to work.
- 2** In the right pane, click the Views tab.
- 3** In the Views area, click the Nested Request link.

The Add/Edit Nested Request page appears.

- 4** Select a request from the Catalog tab in the selection pane, or specify the appropriate path in the Request Path box.
- 5** In the View Name drop-down list, select a view from the nested request that you want to add.

---

**NOTE:** To display the default table view for the nested request, leave the View Name field empty.

---

- 6** When you are done, click Finished.

## Working with Siebel Analytics Pivot Table Views

The Pivot Table view is an interactive view that allows you to rotate the rows, columns, and section headings to obtain different perspectives of the data. Pivot tables are navigable and drillable, and are especially useful for trend reports.

The following procedure “[To create or edit a pivot table](#)” provide the general steps to create a pivot table. For information about additional pivot table formatting options, see the following topics:

- “[Using Multiple Page Drop-Down Lists in Siebel Analytics Pivot Tables](#)” on page 101
- “[Overriding Default Aggregation Rules in Siebel Analytics Pivot Tables](#)” on page 102
- “[Adding Conditional Formatting in Siebel Analytics Pivot Tables](#)” on page 102
- “[Showing an Item’s Relative Value in Siebel Analytics Pivot Tables](#)” on page 103
- “[Using Calculations in Siebel Analytics Pivot Tables](#)” on page 104

For information about navigating in pivot tables, see *Analytics Web Online Help*.

### **To create or edit a pivot table**

- 1 To create or edit a pivot table, do the following:
  - a Navigate to Siebel Answers, and display the request with which you want to work.
  - b In the right pane, click the Views tab.
  - c In the Views area, do one of the following:
    - To create a new pivot table, click the Pivot Table link.
    - To edit an existing pivot table, click the Properties link for the pivot table.

The Add/Edit Pivot Table page displays a pivot table template.

The columns included in the request appear as elements in the pivot table template. See [Table 17 on page 101](#) for a description of pivot table positions.

- 2** Drag and drop the request columns, which appear as elements in the pivot table, to the desired positions in the pivot table template.
- 3** Decide how you want to see previews of the pivot table:
  - To see a preview of the pivot table's appearance while you are working with it, click the Preview option.
  - To see a preview only at certain times, do not select the Preview option. When you want to see a preview, click the Preview link.
- 4** To sort the results, click the Order By icon.

The icon changes to indicate the sort order:

  - An up arrow indicates ascending sequence.
  - A down arrow indicates descending sequence.
- 5** To add column and row grand totals, do the following:
  - a** In the Measures area, click the Totals icon for the row or column to be totaled.
  - b** Select one of the values from the popup menu.

Depending on the position of this element, the totals for the summary data represented by the Measures elements display as a column or row. Column and row totals include labels.

When Totals icon is dimmed, no totals will appear.

- 6 When you are done, click Finished.

After a pivot table is created, you can save it in the Web Catalog.

**Table 17. Siebel Analytics Pivot Table Positions**

Position	Description
Pages	Provides an interactive result set. The values from the columns that appear in the Pages position are used as the initial filter criteria. The values appear in a drop-down list for selection. Based on that selection, a pivot table (composed of the Sections, Columns, Rows, and Measures defined in the pivot table) appears. For more information, see <a href="#">“Using Multiple Page Drop-Down Lists in Siebel Analytics Pivot Tables”</a> .
Sections	Provides initial filter criteria. For each value in the Section column, a unique pivot table appears, composed of the Columns, Rows, and Measures defined in the pivot table.
Columns	Shows an element in a column orientation. Pivot tables can contain multiple columns.
Rows	Shows an element in a row orientation. Like columns, pivot tables can contain multiple rows.
Measures	<p>Populates the section of a pivot table that contains summary data. The elements in the Measures area are summarized based on the elements in the page, section, row, and column fields. Each value in the Measures elements represents a summary of data from the intersection of the source rows and columns.</p> <p>The Measure Labels element, which appears in the Columns area by default, represents the label position for the Measures columns. It also provides totaling and ordering capabilities. If there is only one measure, this element can be excluded.</p>
Excluded	Excludes columns from the pivot table results. Any column that is added as criteria for the request after the pivot table has been created, is added as excluded.

## Using Multiple Page Drop-Down Lists in Siebel Analytics Pivot Tables

When you place multiple attributes in the Pages area in the pivot table, you can set up a multiple page drop-down list. Then, when users view the pivot table in a dashboard, they will see a drop-down list for each attribute, rather than a concatenated list of attributes placed in the page heading.

For example, if you place Region and Brand in the pages area, a Region drop-down list allows the user to select a particular region, and see the data for only that region, rather than seeing Region concatenated with Brand.

#### ***To set up an independent drop-down list***

- 1** Drag and drop your target attributes into the Pages area.
- 2** Click the More Options icon on the second (or any subsequent) attribute in the Pages layout area.
- 3** Select the option Start New Page Drop Down.

The drop-down list for the attribute appears above the preview of the pivot table.

You can create drop-down lists for other attributes in the Pages area. When the report is saved, the drop-down lists will be available to users with access to the report.

## **Overriding Default Aggregation Rules in Siebel Analytics Pivot Tables**

The default aggregation rule for a measure is specified in the Siebel Analytics repository, or by the original author of the report.

#### ***To override the default aggregation rule***

- 1** Click the More Options icon for the measure whose default aggregation rule you want to override.
- 2** Select the option Aggregation Rule, and then select the aggregation rule to apply.

The chosen aggregation rule for the measure is indicated by a check mark.

## **Adding Conditional Formatting in Siebel Analytics Pivot Tables**

To add conditional formatting to a column in a pivot table, see [“Adding Conditional Formatting in Siebel Answers” on page 61](#).

## Showing an Item's Relative Value in Siebel Analytics Pivot Tables

You can dynamically convert a stored or calculated measure on a pivot table into a percent or an index. This shows the relative value of the item, compared to the total, without the need to explicitly create a calculation for it.

For example, if you are using a pivot table to examine sales by region, you can duplicate the sales measure and view it as a percentage of the total. This allows you to see the actual sales, and the percentage of sales, that each region accounts for.

You can view the measure as a percentage between 0.00 and 100.00, or as an index between 0 and 1. Deciding which method to use is at your discretion.

### **To show an item as a relative value**

- 1** Click the More Options icon for the item you want to show as a relative value.
- 2** To duplicate the measure, select the option Duplicate Layer.

The measure is displayed a second time in the pivot table, with the same name. If you want to rename the measure, click More Options and select Rename.

---

**NOTE:** This step is optional. When you duplicate the measure in the pivot table, you can see both the total for the measure and its relative value. This eliminates the need to add the column twice on the Criteria tab to see the total and its relative value in the pivot table.

---

- 3 Select the option Show Data As and choose Percent of or Index of, and then the appropriate submenu option.

**NOTE:** The option Show Data As is available only for items that are stored or calculated measures.

The options for Percent of and Index of are shown below. For Percent of choices, the number of decimal places displayed is dependent upon the type of measure.

Percent of or Index of	Result
Column	Shows the percentage of the column, or index value, that this value constitutes.
Row	Shows the percentage of the row, or index value, that this value constitutes.
Section	Shows the percentage of the section, or index value, that this value constitutes.
Page	Shows the percentage of the page, or index value, that this value constitutes.
Column Parent	Shows the percentage of the column parent, or index value, that this value constitutes.

## Using Calculations in Siebel Analytics Pivot Tables

You can use calculations in a pivot table to obtain different views of the data. The calculations allow you to override the default aggregation rule specified in the Siebel Analytics repository, and for an existing report, the aggregation rule chosen by the author.



Table 18 describes the calculations that you can use in pivot tables.

**Table 18. Siebel Analytics Pivot Table Calculations**

Calculation	Description
Sum	Calculates the sum obtained by adding up all values in the result set. Use this on items that have numeric values.
Min	Calculates the minimum value (lowest numeric value) of the rows in the result set. Use this on items that have numeric values.
Average	Calculates the average (mean) value of an item in the result set. Use this on items that have numeric values.
First	In the result set, selects the first occurrence of the item.
Last	In the result set, selects the last occurrence of the item.
Count	Calculates the number of rows in the result set that have a nonnull value for the item. The item is typically a column name, in which case the number of rows with nonnull values for that column are returned.
Count Distinct	Adds distinct processing to the Count function. This means that each distinct occurrence of the item is counted only once.
Formula	Opens a toolbar that lets you select mathematical operators to include in the calculation.

Internally, Siebel Analytics Web processes pivot table calculations as SQL SELECT statements, and performs the indicated functions on the result set. For more information about SQL functions, see *Siebel Analytics Server Administration Guide*.

## Building Calculations in Siebel Analytics Pivot Tables

You can build calculations for items in the Pages, Sections, Rows, and Columns areas.

### **To build a calculation for an item**

- 1 In the Pages, Sections, Rows, or Columns area, click the More Options icon for the measure on which you want a calculation performed.

- 2 Select the option New Calculated Item.

This opens the Calculated Item window.

- 3 Assign a name for the calculation in the Name field.

- 4 To build a calculation other than a formula, choose from the following options:

- To build one calculation, select the function to work with from the Function drop-down list, and click on one or more items in the Values list to add them to the Function field.
- To build multiple calculations for multiple items, type the functions and click on the item names to add them to the Function field. See [“Examples of Calculations in Siebel Analytics Pivot Tables” on page 107](#) for examples of the kinds of calculations that you can build.

- 5 To build a formula, choose the Formula function.

---

**NOTE:** A formula creates a dynamic custom grouping within the pivot table. All measures referenced in a formula must be from the same logical column and must be present in the results. Formulas can be inserted into, or combined with, other calculations.

---

The mathematical operators become visible below the Functions field. The operators are shown in the following table.

Operator	Description
+	Plus sign, for an addition operation in the formula.
-	Minus sign, for a subtraction operation in the formula.
*	Multiply sign, for a multiplication operation in the formula.
/	Divide By sign, for a division operation in the formula.
\$	Dollar sign, for acting upon the row position of an item in a formula.

Operator	Description
(	Open parenthesis, to signify the beginning of a group operation in the formula.
)	Close parenthesis, to signify the ending of a group operation in a formula.

- a** In the Function field, build the formula by typing or clicking measure names, and clicking operators to insert them into the formula. See [“Examples of Calculations in Siebel Analytics Pivot Tables”](#) for examples of what you can do.
  - b** Use parentheses, where appropriate.
- 6** When the calculation is complete, click Finished.

If any errors are detected, a message will appear. Correct the error and click Finished again.

## Examples of Calculations in Siebel Analytics Pivot Tables

The following examples and explanations assume that you have a basic understanding of SQL and its syntax. The examples are hypothetical. Not all possible calculations are shown.

**Example 1.** This obtains the value of the current measure, such as dollar sales, for each of the products SoftDrinkA, SoftDrinkB, and SoftDrinkC, and adds the values together.

```
sum('SoftDrinkA','SoftDrinkB','SoftDrinkC')
```

This is equivalent to selecting Sum from the Function drop-down list, and then typing or clicking 'SoftDrinkA','SoftDrinkB','SoftDrinkC' to add them to the Function field.

**Example 2.** This obtains the minimum current measure, such as dollars in sales, for SoftDrinkA or SoftDrinkB, whichever is lower.

```
min('SoftDrinkA','SoftDrinkB')
```

In Example 1 and Example 2, each functional calculation is performed for each item in the outer layer, such as the Product layer. For example, if Year and Product are laid out on an axis, and one of the above calculations is built on the Product layer, the results will be computed per year.

**Example 3.** This obtains the values for each item in the outer layer, such as Year and Product, and adds them together.

```
sum( * )
```

**Example 4.** This obtains the current measure, such as dollar sales, of the item from the first, second, and third rows, and sums them.

```
sum( $1, $2, $3 )
```

Instead of specifying a named item, such as SoftDrinkA, you can specify \$n or \$-n, where n is an integer that indicates the item's row position. If you specify \$n, the measure is taken from the nth row. If you specify \$-n, the measure is taken from the nth to the last row.

For example, for dollar sales, \$1 obtains the measure from the first row in the data set, and \$-1 obtains the measure from the last row in the data set.

**Example 5.** This adds sales of SoftDrinkA, SoftDrinkB, and SoftDrinkC.

```
'SoftDrinkA' + 'SoftDrinkB' + 'SoftDrinkC'
```

This is equivalent to the following calculation:

```
sum( 'SoftDrinkA', 'SoftDrinkB', 'SoftDrinkC' )
```

**Example 6.** This adds sales of SoftDrinkA with sales of diet SoftDrinkA, then adds sales of SoftDrinkB with sales of diet SoftDrinkB, and then returns the maximum of these two amounts.

```
max( 'SoftDrinkA' + 'diet SoftDrinkA', 'SoftDrinkB' + 'diet  
SoftDrinkB' )
```

## Working with Siebel Analytics Chart Views

This topic explains how to work with charts.

The default chart type is a bar chart. [Table 19](#) shows the chart types available in Siebel Analytics and describes their uses.

**Table 19. Siebel Analytics Chart Types**

Chart Type	Description
Area	Shows trends in values, like line charts, but also shows the relation of parts to the whole and to each other.
Bar	Shows counts. Good for comparing differences among like items (such as competing product sales, same product sales over different time periods, or same product sales over different markets).
Bubble	Show three variables in two dimensions. Useful when you want to see all three variables on a single set of axes.
Column	Same as a bar chart, but the with x and y axes reversed.
Line	Connects x-y point values and displays them as lines. Often used to show patterns and trends in data that is ordered by time.
Pie	Pie wedges show counts. Good for comparing parts of a whole (such as sales by region or by district).
Scatter	Displays x-y values as discrete points, scattered within an x-y grid. Useful when you want to plot data points based on two independent variables.

## Creating and Saving a Siebel Analytics Chart

After you have created a request, you can display the data in other formats besides a table. You can use the Views page to display a request as a chart.

---

**NOTE:** Siebel Analytics uses a third-party charting engine. The type of the chart, its size, and the number of elements charted can affect whether axes or legends are displayed. This is constrained by the amount of available space on the Web browser page. Sometimes, by adjusting the width and height controls, it is possible to get undisplayed axes and legend values to appear.

---

### **To create a Siebel Analytics chart**

- 1** Navigate to Siebel Answers, and display the request with which you want to work.
- 2** In the right pane, click the Views tab.
- 3** In the Views area, click the Chart link.  
The Add/Edit Chart page appears.  
The Columns area shows the columns that are included in the request.
- 4** Make your selections for Horizontal Axis, Vertical Axis, and Legend Axis.
- 5** In the Chart Type area, click the link for the type of chart that you want to create. For a list of chart types, see [Table 19 on page 109](#).
- 6** In the Other Options area, click the charting options that you want to use.  
For charts with numeric axes, the setting of the Auto Scale option determines how the scale is selected:
  - When this option is selected, the system chooses the scale. It evaluates the range of values on the axis, and chooses appropriate minimum and maximum values for the scale. This is useful when charting a set of large values that are all within a small percentage of each other—the chart zooms in on the values so differences are more easily distinguished.
  - When this option is not selected, the axis minimum is always set to zero (0) for positive numbers.

- 7** Click the Redraw button to see the effects of your changes.

The updated chart appears.

---

**NOTE:** You can click the Redraw button at any time to see the effects of your changes.

---

- 8** If you want to clear all of your changes, click the Clear button.

The chart reverts to its original settings.

- 9** When you are done, click Finished.

After a chart is created, you can save it in the Web Catalog, as described in the next procedure.

**To save a Siebel Analytics chart**

- 1** Create a chart, as described in the previous procedure.

- 2** In the right pane, click the Views tab.

---

**NOTE:** The View section displays each view that is associated with the selected request. You can delete items in this section so that only the items you want remain.

---

- 3** Click Save.

The Save Request page appears.

---

**NOTE:** The name folder to which the chart will be saved appears in the Save Request form. To change the location, click the Change Location link and navigate to the appropriate folder in the Web Catalog. Then click Save Request Here.

---

- 4** In the Name of Request text box, type a descriptive name for the chart.

- 5 In the Description text box, type a brief description for the chart.
- 6 Click Save.

## Changing Siebel Analytics Chart Properties

The following procedures describe how to change various chart properties, such as the size and the number of columns.

### **To refresh the chart preview**

- Click the Redraw button to refresh the chart preview.

### **To remove changes and start from the original chart**

- 1 Click Clear in the chart preview.
- 2 Make new changes to the chart.
- 3 Click Preview to see the results.

### **To change the size of a chart**

- 1 Navigate to Siebel Answers, and display a request associated with the chart you want to modify.
- 2 In the right pane, click the Views tab.
- 3 In the View section, click the Properties link of the chart to be modified.
- 4 In the Width section, click to select a different size.

---

**NOTE:** Adjusting the size of a chart also affects how the axis labels appear.

---

The chart preview updates whenever you make a change to the chart size.

- 5 In the Auto area, do the following:
  - a To scale all elements of the existing chart, including height, with the width selection, select the Height check box.

The chart's height and width remain proportional to each other when the size of the chart changes.



- b** To allow the chart to automatically expand to fit the elements, select the Expand check box.

For example, suppose you create a request to display the sales of three products, create a chart of the results with the product sales displayed as three columns, and size the chart to occupy about 25 percent of the screen. If the report is run later and six products are returned, the chart is expanded to twice its original width, or about 50 percent of the screen, so that the widths of the individual columns displayed in the chart remain constant.

---

**NOTE:** The chart can expand significantly if the number of items being charted grows substantially.

---

- c** To allow the chart to automatically resize chart elements based on the space available within the chart, do not select the Expand check box.

The chart elements will be resized as needed to fit into the chart. Using the example given above, the chart would continue to occupy about 25 percent of the screen, and the columns are resized to fit in the available space.

- 6** Click the Redraw button.

The updated chart appears.

- 7** When you are done, click Finished.

**To add columns to a chart**

- 1** Navigate to Siebel Answers, and display a request associated with the chart you want to modify.
- 2** In the right pane, click the Views tab.
- 3** In the View section, click the Properties link of the chart to be modified.
- 4** In the Columns section, decide which column you want to add to the chart.

- 5 Select the check box beneath the appropriate axis to display that column on the corresponding axis in the chart.

---

**NOTE:** The axis you select determines on which axis the selected column will display.

---

- 6 Click the Redraw button.

The updated chart appears.

- 7 Click Finished.

After modifying a chart, you can save it in the Web Catalog.

#### **To change a chart type**

- 1 Navigate to Siebel Answers, and display the chart you want to modify.
- 2 In the Chart Type section, select the type of chart you want to create.

---

**NOTE:** [Table 19 on page 109](#) describes the charts available in Siebel Analytics.

---

An updated chart preview appears.

- 3 In the Columns section, select the check box beneath the appropriate axis to display a selected column as the corresponding axis in the chart.
- 4 Click the Redraw button.  
The updated chart appears.
- 5 When you are done, click Finished.

#### **To customize a chart**

- 1 Navigate to Siebel Answers, and display a request associated with the chart you want to modify.
- 2 In the right pane, click the Views tab.
- 3 In the View section, click the Properties link of the chart to be modified.

**4** Modify the chart properties as needed by doing the following:

- a** To show or hide labels for 2D chart elements, such as pie slices, bars and other chart elements (including bubbles, scatter points, stacked and absolute area), select the Data Labels check box.

Data labels are enabled by default for selected 2D chart types. Data labels have no effect on charts like 3D Bar and Column.

- b** To show or hide axis titles (corresponding column names), click the Axis icon next to Axes Titles.

The default selection varies based on the type of chart and chart option selected.

- c** To change the location of the chart legend, click the Legend icon next to Legend.

The chart legend can appear at the top, bottom, left, or right side of the chart. The default legend location varies, based on the type of chart selected.

- d** To change the default type of interaction for the chart, click one of the icons next to Interaction, as follows:

- ☐ **Drill.** Allows drilldown functionality for the chart.
- ☐ **None.** Disables drilling or navigation from the chart.
- ☐ **Navigate.** Allows you to navigate to another saved search, dashboard, or Web site. Specify the full path information in the Navigation Path box, for example:

`/shared/topax/performance/transaction details`

**5** Click the Redraw button.

The updated chart appears.

**6** When you are done, click Finished.

After modifying a chart, you can save it in the Web Catalog.

# Working with Siebel Analytics Table Views

The Table view allows you to perform in-depth analysis of the data displayed in the Results tab. You can navigate and drill down in the results. You can display a page of information at a time, control the size of the page, and adjust the position of the page control tape deck. Tables are supported in a variety of formats and can include graphics and links.

For more information, see *Analytics Web Online Help*.

## **Working with Siebel Analytics Ticker Views**

The Ticker view displays the results of the request as a ticker or marquee (similar in style to the stock tickers that run across many financial and news sites on the Web). You can control what information is presented and how the ticker scrolls across the page. The ticker can include graphics and links, and supports a wide variety of formats.

For more information, see *Analytics Web Online Help*.



## Using Siebel Intelligence Dashboards

# 7

A Siebel Intelligence Dashboard is a page in an Analytics application that is used to display the results of one or more Siebel Analytics requests. Based on your permissions, you can view preconfigured dashboards or create your own. This chapter describes the procedures for creating and managing dashboards.

# Overview of Siebel Analytics Dashboards

An Intelligence Dashboard consists of one or more pages, which appear as tabs across the top of the dashboard.

The pages that make up a dashboard can display items, such as references to saved Siebel Answer requests, links to Web sites, Active-X objects, HTML Text, links to documents, and embedded content, such as images, text, charts, and tables. These items are saved in folders within the Siebel Analytics Web Catalog. You create a dashboard by adding views of these items, called *sections*, to the dashboard page.



## Setting Up a Siebel Analytics Dashboard

Dashboard creation is reserved for users with administrative responsibilities. Permission to modify dashboards (personal and shared) is granted to a broader range of users, as determined by a Web administrator. Users with the appropriate responsibilities can modify a dashboard.

Before you add content to a dashboard, make sure that the information you want to display on the dashboard already exists:

- Requests that will display on the dashboard, with their associated views, such as pivot tables and charts.
- iBots that will display on the dashboard.
- Other content that will display on the dashboard.

---

**NOTE:** If iBots are enabled within Siebel Delivers, an Alerts section will be added to the first page of My Dashboard if one is not manually placed there. For information about iBots, see [“Overview of Siebel Delivers” on page 140](#).

---

The process of setting up a dashboard involves the following sequence of tasks:

- 1** Create a new dashboard.
- 2** Add pages to the dashboard.
- 3** Add columns to each dashboard page.
- 4** Add sections to each dashboard column.
- 5** Add content to each dashboard section.

## Navigating to a Siebel Analytics Dashboard

This topic explains how to display and navigate in a dashboard.

### ***To display a dashboard***

- 1** Log in to Siebel Analytics.
- 2** At the top of the page, click the name of a dashboard to display.

The dashboard appears.

Depending on Siebel Analytics privileges, you may be able to manage dashboards. After displaying a dashboard, you can use Siebel Analytics to add, remove, or modify the content on the dashboard.

### ***To navigate to a dashboard page***

- 1** Log in to Siebel Analytics.
- 2** At the top of the page, click the name of a dashboard to display.  
The dashboard appears.
- 3** At the top of the dashboard, click a dashboard page tab to display.

The dashboard content appears. If the dashboard has not already been set up, an empty dashboard notification message appears.

## Modifying a Siebel Analytics Dashboard

You can use the Add Dashboard page and the Dashboard Properties page in Siebel Intelligence Dashboards to edit your dashboards. To access these pages, click one of the following links in a dashboard:

- Create a new dashboard page.
- New Page (to access the Add Dashboard Page).
- Properties (to access the Dashboard Properties page).

## Modifying Siebel Analytics Dashboard Pages and Columns

This topic explains how to add pages to, remove pages from, and remove columns from a dashboard.

### **To add a page to a dashboard**

- 1** Open the dashboard you want to modify.

The dashboard content appears. If the dashboard has not already been set up, an empty dashboard notification message appears.

- 2** Do one of the following:

- To add a page to an empty dashboard, click the Create a new dashboard page link.
- To add a page to a populated dashboard, click the New Page link.

The Add Dashboard Page appears.

- 3** In the Page Name text box, type a name for the dashboard page.

---

**NOTE:** Dashboards that contain only one page do not display the page name as a tab at the top of the dashboard. The name you specify for a page is used as a tab at the top of a dashboard only when the dashboard contains multiple pages.

---

- 4 Click Finish.

The updated dashboard appears.

---

**NOTE:** Every new page automatically contains one column.

---

- 5 After a page has been added to a dashboard, you can perform the following functions:
  - Add a column to the page
  - Create a new section
  - Add a folder to the page
  - Edit the dashboard column

#### **To add a column to a page**

- 1 Navigate to a dashboard page for which you want to modify the columns.
- 2 To add a column, click the New Column link.

The updated dashboard appears.

#### **To remove a column from a dashboard page**

- 1 Navigate to a dashboard page for which you want to modify the columns.
- 2 Click the Edit Column link for the column you want to remove.

The Edit Column page appears.

- 3 In the Edit Sections area, click Delete Column.

---

**NOTE:** Deleting a column that contains content will also delete the content from the dashboard.

---

The updated dashboard appears.

## Adding Sections to a Siebel Analytics Dashboard

When populating the column on a new page, you can choose between the New Section link and the Add Folder link:

- The New Section link creates a folder directly in the dashboard, underneath the \_Portal folder.
- The New Folder link allows you to create a folder anywhere in the /Shared folder and add it as a section to your dashboard. A shortcut to the folder is placed in the dashboard, but the actual folder is in the /Shared folder.

Folders added to the dashboard with the New Section link are visible only when the dashboard is being viewed. Consequently, they cannot be shared between dashboards.

---

**NOTE:** If a folder already exists with the content you want to display in a dashboard, you can select that folder when you add the section. The contents of the folder will be displayed in the new section in the dashboard. Any content that is added to the folder later will automatically appear in the section.

---

### **To add a section to a dashboard**

- 1 Navigate to a dashboard page to which you want to add content.
- 2 Click the New Section link.

---

**NOTE:** If there are multiple columns in the dashboard, click the New Section link for the column you want to modify.

---

The Create New Section page appears.

- 3 In the Section Name text box, type a name for the dashboard section.
- 4 In the Description text box, type a brief description to explain the type of content the section will display.
- 5 Click Create Section.

The updated dashboard appears.

**6** After a section has been added to a dashboard, you can edit the section to add the following items:

- New requests
- Existing requests
- Images
- Links or text
- Items from the Web Catalog
- HTML
- Embedded content

#### ***To edit a dashboard section***

**1** Navigate to a dashboard section you want to edit.

**2** Click the Edit icon in the section.

The Edit Section page appears.

**3** Modify the section as needed.

If you remove a section from a dashboard, only the section itself is deleted. Folders or items that were contained in the section will still reside in the Siebel Analytics Web Catalog. You can edit the contents of the Web Catalog by clicking Manage in Siebel Answers.

#### ***To remove a section from a dashboard***

**1** Navigate to a dashboard section you want to edit.

**2** Click the Edit icon in the section.

The Edit Section page appears.

**3** Click the Remove Section from Dashboard link.

A Confirmation Delete message appears.

- 4 Do one of the following:
  - Click Yes to delete the section.
  - Click No to cancel the deletion and return to the dashboard.

## **Adding Requests to a Siebel Analytics Dashboard**

This topic explains how to add Siebel Analytics requests to a dashboard.

### ***To add a new request to a dashboard***

- 1 Navigate to a dashboard section you want to edit.
- 2 Click the Edit icon in the section.

The Edit Section page appears.
- 3 In the Section Content area, click the New Request link.

Siebel Answers appears.

- 4 Create the request and save it.

For more information about creating a request, see [Chapter 3, “Working with Requests in Siebel Answers.”](#)

- 5 After saving the request, click the Dashboards link.

The new request appears in the edited section in the dashboard.

### ***To add an existing request to a dashboard***

- 1 Navigate to a dashboard section you want to edit.
- 2 Click the Edit icon in the section.

The Edit Section page appears.
- 3 Click the Existing Request link.

The Add Item From Catalog page appears.

- 4 Click the folder link that contains the saved request.

**5** Click the saved request.

**6** Click Finished.

The saved request appears in the edited section.

## Adding Other Kinds of Content to a Siebel Analytics Dashboard

This topic explains how to add images, links, text, Web Catalog items, and HTML to a dashboard.

### **To add an image to a dashboard**

**1** Navigate to a dashboard section to which you want to add an image.

**2** Click the Edit icon in the section.

The Edit Section page appears.

**3** In the Section Content area, click the Image link.

The Add New Image page appears.

**4** Complete the fields as needed.

---

**NOTE:** The URL that you specify for the image should begin with `http://` unless you plan to use an image that is saved on your Web server.

---

**5** To make the image a hyperlink, complete the fields in the Link Options area.

**6** Click Preview.

The Preview Content page displays an active preview of the image.

**7** Click Accept.

**8** Click Finished.

The new image appears in the edited section.



**To add a link or text to a dashboard**

- 1** Navigate to a dashboard section to which you want to add content.
- 2** Click the Edit icon in the section.  
The Edit Section page appears.
- 3** In the Section Content area, click the Link or Text link.  
The Add New Image page appears.
- 4** Complete the fields as needed.
- 5** To make the text a hyperlink, complete the fields in the Link Options area.

---

**NOTE:** The URL that you specify for the image should begin with `http://` unless you plan to use an image that is saved on your Web server.

---

- 6** Click Preview.  
The Preview Content page displays an active preview of the text.
- 7** Click Accept.
- 8** Click Finished.  
The new text appears in the edited section.

**To add a saved Web Catalog item to a dashboard**

- 1** Navigate to a dashboard section to which you want to add content.
- 2** Click the Edit icon in the section.  
The Edit Section page appears.
- 3** In the Section Content area, click the Item from Catalog link.  
The Add Item From Catalog page appears.
- 4** Click the folder link that contains the saved item.

**5** Click the saved item.

**6** Click Finished.

The Web Catalog item appears in the edited section.

#### **To add HTML to a dashboard**

**1** Navigate to a dashboard section to which you want to add content.

**2** Click the Edit icon in the section.

The Edit Section page appears.

**3** In the Section Content area, click the HTML link.

The Add New HTML page appears.

**4** In the Item Name text box, type a descriptive name for the HTML item.

---

**NOTE:** The name you supply will not appear in the dashboard. It is used to save the HTML item to the Siebel Analytics Web Catalog.

---

**5** Click Preview.

The Preview Content page displays an active preview of the HTML.

**6** Click Accept.

**7** Click Finished.

## Embedding Content in a Siebel Analytics Dashboard

You can embed content into a dashboard. Embedded content is any content that is displayed in a window (called a frame) in a dashboard, as opposed to content that is accessed by clicking a link. Content that you may want to embed includes Siebel Analytics requests, Excel charts, documents, Web sites, and tickers from Web sites.

---

**NOTE:** Some third-party Web sites, because of the way they have been created, cannot be embedded within another Web page. If you try to embed a Web site that does not allow it, the site will occupy the entire window when you preview it. To prevent this from happening, either click your browser's Back button until a Siebel Analytics page reappears, or close and then reopen your browser.

---

When you embed content into a dashboard, Siebel Analytics automatically adds the required HTML to the target content. You can add additional HTML to incorporate other effects.

### **To add embedded content to a dashboard**

- 1** Navigate to a dashboard section to which you want to add content.
- 2** Click the Edit icon in the section.

The Edit Section page appears.

- 3** In the Section Content area, click the Embedded Content link.

The Add Embedded Content page appears.

- 4** Enter the Location information by doing the following:

- a** In the URL text box, type the URL or the network path for the content you want to embed.

---

**NOTE:** The URL that you specify should begin with `http://` unless you plan to use an item that is saved on your Web server. If you use a network path to indicate the location of the item, make sure you use the exact path. Items that are embedded on a shared dashboard must be located on a network drive accessible to all users.

---

- b** In the Width text box, type the width (in pixels) for the area the content will occupy.
- c** In the Height text box, type the height (in pixels) for the area the content will occupy.

---

**NOTE:** The default size of the embedded content area is 600 by 440 pixels. The dimensions that you specify for the content area will apply even if the content does not fill the area. For example, if you embed an image and indicate a width of 100 and a height of 100, but the image only has a width of 50 and a height of 50, the dashboard designates an area with the dimensions you specified (100 by 100). Items that you place in the content area are not stretched or reduced to fit the area.

---

- d** If the embedded item is larger than the content area that you specify, scroll bars automatically appear in the section. To prevent scroll bars from appearing, select the Hide Scroll Bars option.

**5** Click Preview.

The Preview Content page displays an active preview of the text.

**6** Click Accept.

**7** Click Finished.

The updated dashboard appears.

**To embed a request in a dashboard**

**1** Copy a request shortcut by doing the following:

- a** Navigate to Siebel Answers.
- b** In the selection pane, click the Catalog tab.
- c** In the Catalog Explorer, expand the folders within the Web Catalog to display the saved requests.
- d** Click the request you want to embed.
- e** Click the Advanced tab.

- f** In the Referencing the Results area, right-click the link that references the information you want to embed, and choose Copy Shortcut from the pop-up menu.

---

**NOTE:** The links on the Advanced tab have descriptions that explain how the request will appear. To preview a request, click the link for the request you want to preview. Previews from the Advanced tab appear in a new window. To return to Siebel Answers, close the preview window.

---

- 2** Navigate to a dashboard section to which you want to add content.

- 3** Click the Edit icon in the section.

The Edit Section page appears.

- 4** In the Section Content area, click the Embedded Content link.

The Add Embedded Content page appears.

- 5** Enter the Copied Shortcut information by doing the following:

- a** Right-click in the URL text box and choose Paste from the pop-up menu.
- b** In the Width text box, type the width (in pixels) for the area the content will occupy.
- c** In the Height text box, type the width (in pixels) for the area the content will occupy.
- d** If the embedded item is larger than the content area that you specify, scroll bars automatically appear in the section. To prevent scroll bars from appearing, select the Hide Scroll Bars option.

- 6** Click Preview.

The Preview Content page displays an active preview of the text.

- 7** Click Accept.

- 8** Click Finished.

The updated dashboard appears.

## Modifying Siebel Analytics Dashboard Properties

You can use the Dashboard Properties page to display or modify properties for a dashboard.

---

**CAUTION:** When you modify a dashboard property, the changes you make cannot be reversed, even if you click Cancel before you click Finished.

---

If the Siebel Administrator has created styles, you can use the General Properties area to select the style used by a dashboard. The style controls how dashboards and results look. Styles control elements, such as images, backgrounds, chart colors, and chart attributes.

### ***To select a style for a dashboard***

- 1** Open the dashboard to which you want to apply a style.
- 2** Click the Properties link.  
The Dashboard Properties page appears.
- 3** In the Style drop-down list, select the style to apply to the selected dashboard.
- 4** Click Finished.

The updated dashboard appears.

The optional Siebel Delivers feature allows dashboard content to be enabled for access from a variety of devices.

### ***To enable or disable devices for a dashboard***

- 1** Open the dashboard for which you want to modify the supported device.
- 2** Click the Properties link.

The Properties page appears.

- 3** In the General Properties area, do one of the following:
  - To activate dashboard support for a particular device, click the device icon to highlight it.
  - To disable dashboard support for a particular device, click the device icon to make it unavailable.
- 4** Click Finished.

The updated dashboard appears.

## **Modifying Siebel Analytics Dashboard Page Properties**

You can delete, rename, and reorder pages in a dashboard.

### ***To rename a dashboard page***

- 1** Open the dashboard you want to modify.
- 2** Click the Properties link.

The Dashboard Properties page appears.
- 3** In the Existing Pages area, click the Rename icon of the page you want to change.

The Rename Item page appears.
- 4** In the New Caption text box, type the new name of the dashboard page.
- 5** Click Rename.
- 6** Click Finished.

The updated dashboard appears.

### ***To delete a dashboard page***

- 1** Open the dashboard you want to modify.
- 2** Click the Properties link.

The dashboard Properties page appears.

- 3 In the Existing Pages area, click the Delete icon of the page you want to remove.

A Confirm Deletion message appears.

- 4 Click Yes.

The updated dashboard appears.

The Existing Pages section of the Dashboard Properties page displays the existing dashboard pages. The pages are listed in the same order as their tabs.

#### ***To reorder the pages in a dashboard***

- 1 Open the dashboard you want to modify.

- 2 Click the Properties link.

The Dashboard Properties page appears.

- 3 In the Existing Pages area, use the Move Up and Move Down icons to reorder the existing pages.

---

**NOTE:** The Move Up icon moves the page tab to the left. The Move Down icon moves the page tab to the right.

---

- 4 Click Finished.

The updated dashboard appears.

The optional Siebel Delivers feature allows page content to be accessible from a variety of devices, including Web, mobile browser, and voice browser. You can specify the devices to be enabled for each page.

#### ***To enable or disable a device for an existing page***

- 1 Open the dashboard you want to modify.

- 2 Click the Properties link.

The Dashboard Properties page appears.



- 3** In the Existing Pages area, select the page for which you want to modify the supported devices and do one of the following:
  - To activate page support for a device, select the device selection check box.
  - To disable page support for a device, clear the device selection check box.
- 4** Click Finished.

The updated dashboard appears.



Siebel Delivers automates requests that have been created and saved with Siebel Answers. Siebel Delivers runs the automated requests based on a schedule that you define. The results, or *alerts*, are tailored for each associated delivery device and passed to subscribed users. The job management and scheduling services are handled by the Siebel Scheduler component of Siebel Delivers. Siebel Delivers is an optional component of Siebel Analytics. When installed it is enabled by default.

This chapter provides information about using Siebel Delivers.

## Overview of Siebel Delivers

Siebel Delivers allows you to create your own unique form of information insurance, in which any information-based problem or opportunity can be detected, and the appropriate person can immediately be notified through Web, wireless, mobile, or voice. communication channels.

### **To access the main Siebel Delivers page**

- Click the Delivers link at the top of any Siebel Answers, Siebel Delivers, or Siebel Intelligence Dashboard page.

Access is available to all Siebel Analytics users (the Everyone group) by default.

Siebel Delivers uses intelligence agents called *iBots*. iBots are software-based agents driven by schedules or events that can access, filter, and perform analytics on data based on criteria you specify. iBots provide delivery of real-time and personalized analytics alerts throughout your organization's network.

After detecting a problem or opportunity, iBots can determine the appropriate individual(s) to notify. They can then deliver information to that person through devices such as email, pager, PDA, RIM and US and European mobile phones, and so on. Content and capabilities are automatically optimized for the recipient's device.

In its simplest form, an iBot automatically performs a specified Web Catalog request (created with Siebel Answers), based on a defined schedule. The results, referred to as alerts on Siebel Intelligence Dashboards, are tailored for each associated delivery device and passed to people who are *subscribed* to the iBot. For example, suppose an iBot runs a query to obtain the weekly sales information for each region. The specified alert, which includes the total weekly sales for the region and comparable sales information for the previous year, goes to each regional sales manager through the specified devices.

## Configuring Your Siebel Delivers Options

You can configure your delivery options through the My Account link. This link is available on the main page in Siebel Answers, Siebel Delivers, and Siebel Intelligence Dashboards. The Delivery Options section allows you to configure devices (My Devices) and delivery profiles (My Delivery Profiles) for use by Siebel Delivers.

### **To configure a delivery option**

- 1** Navigate to Siebel Analytics.
- 2** Click the My Account link.
- 3** To modify a delivery option, do the following:
  - a** In the Delivery Options section, click the Edit link for the device you want to modify.
  - b** Update the delivery options as needed.
  - c** Click Finished.
- 4** To delete a delivery option, do the following:
  - a** In the Delivery Options section, click the Delete link of the device you want to delete.

A delete confirmation message appears.
  - b** Click Yes.

## Adding Siebel Delivers Devices

When Siebel Delivers is enabled, you can configure the application to deliver content to specific devices. For example, you may want to receive email updates, or you may be out of the office for a few days and want the information delivered to your text messaging pager.

### **To add a delivery device**

- 1 Navigate to Siebel Analytics.
- 2 Click the My Account link.
- 3 In the Delivery Options section, click the Add Device link.

The Device page appears.

- 4 In the Category list, click the type of device you want to add.

---

**NOTE:** Hold your mouse over a category icon to see a popup description of the device type.

---

- 5 In the Device Name text box, type a descriptive name for the device.
- 6 In the Device/Provider drop-down list, select the appropriate delivery format or provider.
- 7 In the Address field, type the address for the device type. For example, to create an email device, type the email address for your account. To create a telephony device, type the ten-digit phone number for your device.

---

**NOTE:** When typing a phone number, do not use punctuation, such as spaces, dashes, or parentheses.

---

- 8 Click Finished.

## Adding and Modifying Siebel Delivers Profiles

Siebel Delivers uses your active delivery profile to determine which devices receive delivered content. For example, you might have an In the Office delivery profile that delivers content to a Web browser and office email, and an On the Road profile that delivers content to your pager or PDA, depending on the priority of the information. Access the My Account link to switch between available profiles as needed.

---

**NOTE:** The My Delivery Profiles feature appears only when one or more delivery devices are configured for your account. If no devices are configured to deliver content to you, the My Delivery Profile feature does not appear on the My Account page.

---

### **To add a Siebel Delivers profile**

- 1 Navigate to Siebel Analytics.
- 2 Click the My Account link.
- 3 In the Delivery Options section, click the Add Delivery Profile link.  
The Delivery Profile page appears.
- 4 In the Delivery Profile Name text box, type a descriptive name for the profile.
- 5 In the Define Profile section, select the delivery priority for the devices you want to use with the profile.

---

**NOTE:** Do not set the priority for devices that you do not want to use. Devices that do not have a priority selected are not used by the profile.

---

- 6 Click Finished.
- 7 To activate the profile, click the Select link for the profile. A check mark indicates that the profile is active.

### **To modify, delete, or activate a Siebel Delivers profile**

- 1 Navigate to Siebel Analytics.
- 2 Click the My Account link.

- 3** To modify a delivery profile, do the following:
  - a** In the Delivery Options section, click the Edit link for the delivery profile you want to edit.
  - b** Update the profile options as needed.
  - c** Click Finished.
- 4** To delete a delivery profile, do the following:
  - a** In the Delivery Options section, click the Delete link for the delivery profile you want to delete.

A delete confirmation message appears.
  - b** Click Yes.
- 5** To activate a delivery profile, click the Select link for a profile to activate. A check mark indicates that the profile is active.
- 6** Click Finished.



## Accessing Siebel Analytics Alerts

The Siebel Alerts page shows your currently active alerts, along with information about when the content was delivered. You can view active alert content, or clear all occurrences of the active alert. The alert will be triggered again when conditions warrant.

When alerts are present, the link Alerts! appears at the top of each Siebel Answers, Siebel Delivers, and Siebel Intelligence Dashboard page.

### **To access alerts**

- Click the Alerts! link from Siebel Answers, Siebel Delivers, or Siebel Intelligence Dashboards.

When Siebel Delivers is enabled, you can add an Alerts section to any dashboard page. However, an Alerts section will be automatically added to the first page of your My Dashboard if one is not manually placed there.

## Creating a Siebel Delivers iBot

This section explains how to create an iBot in Siebel Delivers.

### **To create an iBot**

- 1** Navigate to Siebel Analytics.
- 2** Click the Delivers link.
- 3** In the selection pane, navigate to the saved request or folder for which you want to create an iBot, and select it.

The iBot Definition page appears.

- 4** Create the iBot by doing the following:
  - a** In the iBot Caption text box, type a descriptive name for the iBot.
  - b** In the iBot Description text box, type a brief description for the iBot.
  - c** Click the When would you like the iBot to run? link.

The Schedule page appears.

- 5** To run the iBot only once, do the following:
  - a** In the Start Date text box, click the calendar select button and select the date on which the iBot should start.
  - b** In the Recurrence section, click to select the Run once option.
- 6** To schedule the iBot to repeat on an interval, do the following:
  - a** In the Start Date text box, click the calendar select button and select the date on which the iBot should start.

**NOTE:** To make the iBot start immediately, leave the Start Date blank and select the Start Immediately option.
  - b** In the Recurrence section, choose the frequency with which you want to run the iBot.
  - c** In the End Date section, select when you want the iBot to become inactive.
- 7** Click Finished.
- 8** Click Save.

# **Siebel Consumer Goods Sales Analytics**

# **9**

Siebel Consumer Goods Sales Analytics provides information to business users in consumer goods sales organizations. This chapter describes a sample business scenario, and provides information about the dashboards in Siebel Consumer Goods Sales Analytics.

## **Siebel Analytics Consumer Goods Business Scenario**

This scenario is an example of a process flow performed by several employees in a consumer goods organization. Your organization may have a different process flow.

### **Vice President of Sales**

The vice president of sales has access to sales data across all accounts, categories, and products. The vice president needs to understand the business at a high level, and to be able to drill down into details when necessary.

The vice president uses the weekly scorecard to track measures. The vice president also views the dashboards to understand business questions such as where business is originating from, the effectiveness of promotions by channel, the best- and worst-performing account plans, and the percentage of sales per category.

### **Key Account Manager**

The key account manager is typically responsible for one or more accounts. The key account manager has access to the same types of information as the vice president of sales, but sees it only for the accounts that he or she manages.

This manager uses Siebel Analytics to understand performance at specific stores and individual performance toward objectives. The manager uses the weekly scorecard to track measures, and views dashboards that contain information about business questions. The dashboards show the manager's account plan performance, the products and product lines that are being promoted most effectively, the accuracy of the manager's promotional volumes forecasting, funding available for additional promotions, and other information.

# **Siebel eConsumer Goods Sales Analytics Dashboards**

Siebel eConsumer Goods Sales Analytics dashboards are available to users of Siebel eConsumer Goods Sales Analytics.

Siebel eConsumer Goods Sales Analytics includes dashboards from Siebel Sales Analytics and dashboards that address the needs of consumer goods sales organizations. These dashboards provide information and analytics to all levels of a sales organization.

## **Promotion Analytics**

This dashboard compares product volumes with funds spent to generate several key performance indicators. These indicators provide analyses of an organization's plans, promotions, and promoted products.

## **Fund Analytics**

This dashboard provides information and analyses for use in managing funds.

## **Performance Analytics**

This dashboard provides information about all levels of an organization's sales performance and effectiveness. This includes baseline and incremental information. This dashboard shows information about targets, shipments, consumption volumes and sales numbers across accounts, product categories and hierarchies, and historical data.

## **Retail Audit Analytics**

This dashboard provides information about an organization's store conditions and performance. This information can be used to target customers for future activities and promotions.

### **VP Sales Analytics**

This dashboard is for the vice president of sales and other executives. It provides information about overall sales performance.

### **Key Account Analytics**

This dashboard is for key account managers. It provides information about account performance. Key account managers are typically interested in detailed information for a single account, or a small group of accounts.

# **Siebel Communications, Media, and Energy Analytics 10**

Siebel Communications, Media and Energy (CME) Analytics provides information to business users in communications, media, and energy organizations. It provides analytics in the areas of loyalty and retention management, service order performance, trouble ticketing, and customer survey management.

This chapter describes a sample business scenario and provides information about the dashboards in Siebel CME Analytics.

## **Siebel Analytics CME Business Scenario**

This scenario is an example of a process flow performed by several employees in a communication, media, or energy organization. It illustrates employees analyzing and acting on loyalty and retention program effectiveness, sales performance, service trends, and customer satisfaction results. Your organization may have a different process flow.

### **Marketing Manager**

The marketing manager is responsible for customer loyalty and retention, with an emphasis on the customers that generate the most revenue. The marketing manager uses the Loyalty Management dashboard to identify customers with the highest lifetime value. Within this customer group, the marketing manager identifies the customers with the highest churn propensity. These customers are then targeted in a loyalty and retention campaign.

The marketing manager can further segment these customers by viewing other metrics, such as upsell and cross-sell propensities and financial risk. The marketing manager can also view information about each customer's recent purchase activity, purchase activity frequency, and monetary quintile.

### **Sales Manager**

The sales manager is responsible for understanding the revenue performance of the organization's products and services, and which customers generate the most revenue. The sales manager uses the Revenue Management dashboard and the Account Management dashboard to view information about sales performance for service activations, service modifications, and service disconnections.

The sales manager uses the Revenue Management dashboard to see a product-based view of sales performance. It shows service order sales trends over time and the best selling product lines, products, and services. The sales manager can access more detailed information about items of interest.

The sales manager uses the Account Management dashboard to see a customer-based view of sales performance. It shows the best-performing accounts, and the best-selling products and services for individual accounts.



## **Sales Representative**

The sales representative is responsible for sales and customer satisfaction at specific accounts. The sales representative uses the Account Management dashboard to see sales and service performance indicators. The sales representative uses this information to monitor account status and to prepare for sales calls.

The sales representative can limit the analysis to a single account and date range, to see revenue and order volume performance for service activations, modifications, and disconnections. The sales representative can also examine service metrics about the account's trouble ticket history and satisfaction scores.

## **Product Manager**

The product manager is responsible for the sales effectiveness of a particular product and its value proposition to customers. The product manager uses the Revenue Management dashboard to see which products are selling well. The product manager can narrow the analysis to a single product or service.

To see revenue trends for products or services, the product manager can narrow the analysis to any date range.

## **Service Manager**

The service manager is responsible for customer service and customer satisfaction. The service manager uses the Account Management dashboard to view key service and customer satisfaction performance indicators, at aggregated customer levels and at account-specific levels.

By analyzing trouble tickets, the service manager can determine why, when, and how trouble tickets occur, their effect on customers, and trends over time. The service manager can use this information in efforts to reduce future trouble tickets.

By analyzing customer satisfaction surveys, the service manager can determine customer satisfaction levels, identify areas where service improvements are needed, and track the responsiveness of key customers.

## **Siebel CME Analytics Dashboards**

Siebel Communications, Media, and Energy Analytics dashboards are available to users of Siebel Communications, Media, and Energy Analytics.

### **Loyalty Management Analytics**

This dashboard provides marketing professionals with information about potential customer behavior. The Loyalty Management dashboard works with data from any third-party predictive modeling application, with appropriate scoring models. The dashboard uses this data to segment customers based on projected customer lifetime value, propensity to churn, propensity to accept an upsell or cross-sell marketing offer, and estimated financial risk. Marketers and other professionals can use this information to optimize return on investment for customer loyalty and retention programs.

### **Revenue Management Analytics**

This dashboard provides sales professionals with information about the most successful products and services. It also provides a trend analysis of sales and service order performance over time. Sales professionals can view information about service activations, modifications, and disconnections. A summary analysis is also available.

### **Account Management Analytics**

This dashboard provides information about account sales and service performance. Sales and marketing professionals can view information about the best-performing accounts, the best-selling products for accounts, and service order distribution, based on account characteristics. Service professionals can view information about account trouble ticketing, customer satisfaction trends, and customer satisfaction metrics. Account performance metrics are available for individual accounts and at more aggregated levels.

# Siebel Workforce Analytics **11**

Siebel Workforce Analytics provides information to business users in the areas of employee performance, help desk support, and human resources. This chapter describes a sample business scenario, and provides information about the dashboards in Siebel Workforce Analytics.

## **Siebel Analytics Workforce Business Scenario**

This scenario is an example of a process flow performed by an organization's vice president, human resources manager, business manager, and help desk manager. Your organization may have a different process flow.

### **Vice President**

The vice president needs to know who the top performers are in various organizational areas. For example, in the Overview tab of the Employee Performance dashboard, the vice president selects the division, organization, manager, and time period of interest to view information about the best performers. The vice president notices that employee review scores are high in relation to other areas, and asks the human resources department to investigate.

### **Human Resources Manager**

The human resources manager receives the vice president's request and accesses the Performance Management tab in the Human Resource Analytics dashboard. This shows the distribution of employee review scores. The human resources manager uses that information to identify the division that may have inflated the review scores, and develops a plan to address the situation.

### **Business Manager**

The business manager views the Team Status page in the Employee Performance dashboard to determine trends in employee review scores and information about training for the team. The business manager also checks the status of current reviews and training for the current quarter. Additionally, the business manager monitors his or her own performance by examining the information available on the My Performance tab.

## **Help Desk Manager**

The help desk manager needs to evaluate individual team performance and the overall performance of the help desk. The help desk manager uses the charts on the Overview and Staff Performance tabs to view information about service requests, such as the number open and closed, their sources, areas, and so on. The help desk manager drills down into the charts to obtain more detailed information. The help desk manager also reviews the weekly report cards that are sent automatically to all help desk agents.

## **Help Desk Agent**

The help desk agent uses the information in the weekly report card to review individual performance for the week. The agent notices that closure rates are weak in a particular area. The agent then accesses Siebel eTraining to enroll in a Web-based course that provides training in that area.

## **Siebel Workforce Analytics Dashboards**

Siebel Workforce Analytics dashboards are available to users of Siebel Workforce Analytics.

### **Employee Performance**

This dashboard is for all employees. It provides information that allows you to analyze data about your performance.

### **HelpDesk Analytics**

This dashboard is for help desk employees, help desk managers, and corporate executives. It provides information that can be used to evaluate the performance of a team or an entire help desk center, based on open and closed service requests. You can drill into specific elements of service requests to display more detailed information.

### **Human Resource Analytics**

This dashboard is for human resources managers and corporate executives. It provides information that can be used to check the distribution of review scores. It also shows trends in review scores and training.

# Siebel eInsurance Analytics **12**

Siebel eInsurance Analytics provides information to business users in insurance organizations. This chapter provides information about the dashboards in Siebel eInsurance Analytics.

## **Siebel eInsurance Analytics Dashboards**

The Siebel eInsurance dashboards are available to users of Siebel eInsurance Analytics.

### **Policy Sales Analytics**

This dashboard is for sales executives, managers, and agents. It contains reports that show revenue trends, agent productivity, cross-sell effectiveness, customer retention, and new business. Insurance carriers can use these reports to monitor their sales operations and make appropriate changes to their sales strategies.

### **Policy Service Analytics**

This dashboard is for policy servicers, such as customer service executives, call center managers, and customer service representatives. It contains reports that show service request statistics, customer satisfaction scores, and claims service performance indicators. Policy servicers can use this information to monitor and maintain customer service levels across all channels and all lines of business.

### **Insurance Marketing Analytics**

This dashboard is for marketing executives, managers, and analysts. It contains reports that display measurements in customer acquisition, retention and attrition, customer segments, household demographics, and product penetration. These reports can be used to help maximize return on investment (ROI) by allocating marketing resources to the proper prospects, through the most effective channels.

### **Insurance Claims Analytics**

This dashboard is for insurance claim executives, insurance claim managers, and individual adjusters. It shows loss ratios, claims cycle times, reserve accuracy, and salvage and subrogation effectiveness in claim settlement. You can use this information to monitor and maintain the effectiveness of claims operations.



### **Insurance Agents/Partners Analytics**

This dashboard is for partner executives and managers who need information about business relationships with their partners. It provides information for use in monitoring agent and agency productivity, the quality of submissions, and customer retention. Carriers can use this information to manage partner relationships and to allocate resources to partners.

### **Insurance Executive Analytics**

This dashboard is for insurance executives who need a view of the operations of the company as a whole. It contains reports that show information about sales, customers, service, and the market. Insurance executives can use this information to monitor their company's operations, and to make changes to their corporate strategies.



# Siebel eHealthcare Analytics **13**

Siebel eHealthcare Analytics provides information to business users in health care organizations. This chapter provides information about the dashboards in Siebel eHealthcare Analytics.

## **Siebel eHealthcare Analytics Dashboards**

The Siebel eHealthcare Analytics dashboards are available to users of Siebel eHealthcare Analytics.

### **Health Plan Executive Analytics**

This dashboard is for health care executives who need to monitor business operations across all health insurance lines of business. It contains reports that show information about medical costs, sales, service, claims, and customers.

### **Health Plan Sales Analytics**

This dashboard is for sales executives, managers, and agents. It contains reports that show information about revenue trends, close ratios, agent productivity, customer retention, and new business. Health care carriers can use this information to monitor their sales operations and to adjust their sales strategies.

### **Health Plan Service Analytics**

This dashboard is for customer service executives, call center managers, claims managers, and customer service representatives. It contains reports that display call center metrics, service requests statistics, customer satisfaction scores, claims service, and lag statistics. This information can be used to monitor and maintain customer service levels across channels and lines of business.

### **Health Plan Marketing Analytics**

This dashboard is for marketing executives, managers, and analysts. It contains reports that display measurements in campaign spending, response rate, customer acquisition cost, customer demographics, and marketing channel effectiveness. Use these reports to help allocate marketing resources to the proper prospects, through the most effective channels and products.

### **Insurance Agents/Partners Analytics**

This dashboard is for partner executives and managers who need information about the business relationships with their partners. It provides information for use in monitoring agent productivity, agency productivity, quality of submissions, and customer retention. Insurance carriers can use this information to manage partner relationships and to allocate resources to partners.

# Siebel eFinance Analytics 14

Siebel eFinance Analytics provides information to business users in retail and institutional financial organizations. This chapter provides information about the dashboards in Siebel eFinance Analytics.

## **Siebel Analytics Retail Finance Dashboards**

The Siebel eFinance Analytics dashboards are available to users of Siebel eFinance Analytics. This topic describes the Retail Finance dashboards.

### **Consumer Banking Analytics**

This dashboard is for executives and managers throughout consumer banking, including call centers and branch banking. Typical users include personal bankers, branch managers, regional managers, consumer banking executives, and call center managers. This dashboard provides analyses in areas, such as customer attrition, customer profitability, and sales and service performance. The dashboard can display the information by region or by individual branch.

This information can be used to track sales performance across deposit and loan products, including new account activity, balance trends, and application status. It can also be used to improve sales effectiveness by alerting employees to cross-sell opportunities and by tracking their activities.

Managers can monitor customer attrition, service volume, and service performance by employee, customer, or service request type, to help make sure that the best customers are receiving high quality service.

### **Credit Analytics**

This dashboard is for credit executives, managers, underwriters, and analysts that work with consumer lending and mortgages. It shows new loan activity, application volume and status, trends in asset quality, and loan portfolios, across metrics, such as average balance and maturity. This information can be used to increase sales and to manage loan risk.

## **Credit Card Analytics**

This dashboard is for credit card executives and managers who need information about customers charge-offs and profitability. It shows credit card metrics, such as delinquency rate, charge off rate, application volume, customer profitability, churn, and so on. This information can be used to make decisions on managing customer credit card portfolios.

## **Private Banking Analytics**

This dashboard is for personal bankers, private bankers, and relationship managers who need to track the overall health of their book of business. It shows information, such as assets under management, product penetration, and share of customer wallet.

Mappings to Siebel Industry Applications allow the creation of alerts that can inform relationship managers about events or client actions that impact their book of business. Management can access aggregated information on wallet share, assets under management, and other metrics. This can help them to assess employee performance and to focus employees on important relationships.

## **Siebel Analytics Institutional Finance Dashboards**

The Siebel eFinance Analytics dashboards are available to users of Siebel eFinance Analytics. This topic describes the Institutional Finance dashboards.

### **Investment Banking Analytics**

This dashboard is for investment bankers who work with initial public offerings, mergers, and acquisitions. It is also for bank managers who manage opportunity pipelines. It provides investment bankers and managers with an overall view of current opportunities, potential and closed revenues, client distribution, and activity status. Use this dashboard to help identify the most important opportunities, industries, and clients that need focus and attention; and then redistribute resources appropriately.

### **Institutional Sales Analytics**

This dashboard is for desk, region, and division managers in the institutional sales division of a bank and the salespeople they manage. It provides managers with a breakdown of revenues by product, region, client, and salesperson. It also provides information about activity levels. This information can help you distribute resources to the most active desks.

Salespersons can view aggregated information about their products, clients, and holdings. They can use it to help develop targeted call lists and to make informed sales calls.

### **Corporate and Commercial Banking Analytics**

This dashboard is for relationship managers, credit officers, and managers in a corporate or commercial bank. It provides information about revenues, loans, and risks. This information can be used to help commercial bankers increase returns for their key clients.

Displays of aggregated information are also available. These provide you with information that can be used to drive cross-sell opportunities through various product groups within the bank.



## **Wealth Management Analytics**

This dashboard is for financial advisors and managers that work with household accounts. Advisors in retail brokerages and private client services firms can use the summary information on assets under management, households, activities, and service to make decisions about managing their clients' wealth.

Managers in these organizations can access information about aggregated revenue and assets. This information can be used to help tier their customers and distribute resources.

## **Separate Account Management Analytics**

This dashboard allows users in a separate account management firm to see an overview of the status of the accounts currently being managed. Account managers, service managers, and portfolio managers can use this dashboard to view aggregated information about assets under management, current clients, outstanding service issues, and revenues. This snapshot of the business helps these users to respond to requests for price quotes, manage client relationships, and manage client investments.

## **Investment Holdings Analytics**

This dashboard is for users in banks that need to manage and monitor client holdings. It provides information about products, the industry, and investors. Users from various business lines can see a snapshot of the overall holdings. The information in this dashboard can help to identify the most popular investment products and sectors. It can also be used to help identify the bank's best customers, including institutional, household, and retail investors.

### **Finance Marketing Analytics**

This dashboard is for marketing executives, managers, and analysts. It contains reports that display measurements in customer acquisition, retention and attrition, customer segments, household demographics, product penetration, accounts, balances, campaign analysis, and other metrics. This can help you maximize return on investment (ROI) by allocating marketing resources to the proper prospects through the most effective channels.

### **Finance Executive Analytics**

This dashboard is for finance executives who need information about the organization as a whole. It contains reports that provide information about sales, customers, service, and the market. Finance executives can use these reports to monitor operations and to adjust their corporate strategies.

# Siebel Order Analytics **15**

Siebel Order Analytics provides information to business users in organizations that deliver order fulfillment services. This chapter describes a sample business scenario, and provides information about the dashboards in Siebel Order Analytics.

## **Siebel Analytics Order Fulfillment Business Scenario**

This scenario is an example of a process flow performed by an order fulfillment organization's vice president, plant manager, and line manager. Your organization may have a different process flow.

### **Vice President**

To obtain a high-level view of the business, the vice president accesses the Executive dashboard every day to see an overview of the order pipeline and the top ten accounts. To obtain a different perspective of the state of the business, the vice president then views more detailed information about the top ten products. Finally, the vice president examines order pipeline details to gauge potential opportunity revenue.

### **Plant Manager**

Every day, the plant manager assesses the orders that will probably require fulfillment. The plant manager accesses the Quotes and Orders dashboards to view information about the weekly order pipeline and the order volumes. This provides the plant manager with a high-level overview of the number of orders. This also provides information about pending revenue for orders of different types and at different stages of the order process. The plant manager then examines overview information about products with the highest revenue and order frequency.

To focus on potential problem areas, the plant manager accesses the Orders dashboard to analyze trends and to obtain specific information about late orders.

### **Line Manager**

Every day, the line manager accesses the Orders Exception dashboard to view information about orders that require fulfillment that day and in the near future. The line manager accesses the Process Efficiency tab to examine information about order processing times and fill rates. These show trends over time and across regions, order type, status, and product line. The line manager uses this information to identify and resolve issues that are impeding performance.

The line manager then performs a high-level assessment of problem areas on the late orders report, and drills down to obtain more detailed information for issue resolution.

# **Siebel Order Analytics Dashboards**

The Order Analytics screen is available to users of Siebel Order Analytics.

## **Executive Analytics**

This dashboard is for senior executives. It provides information about key performance indicators of an organization's product, pricing, and order processing. This dashboard also provides overview information that shows the state of the business across customer channels.

## **Quote Analytics**

This dashboard is for organizations that need to track the effectiveness of their quotes in a multichannel business. Information is provided about quota exceptions, discounts, products often quoted but not purchased, and abandoned shopping carts for the Web channel.

## **Order Analytics**

This dashboard is for operations managers who need to track the operational efficiency of their order processing units. Operations managers can view order processing times, order pipeline exceptions, process efficiency, on-time delivery, and order payment. This information can be used to assess the business unit's performance against the performance indicators used to evaluate the business.



# Siebel Product Analytics **16**

Siebel Product Analytics provides information to business users in product organizations. This chapter describes a sample business scenario, and provides information about the dashboards in Siebel Product Analytics.

## **Siebel Analytics Product Business Scenario**

This scenario is an example of a process flow performed by a product sales organization's vice president, regional manager, and district manager. Your organization may have a different process flow.

### **Vice President**

The vice president accesses the Executive dashboard every day to see an overview of the order pipeline and the top ten accounts. This gives the vice president a high-level view of the business. To obtain a different perspective of the state of the business, the vice president then views more-detailed information about the top ten products. Finally, to gauge potential opportunity revenue, the vice president examines order pipeline details.

### **Product Manager**

Every day, the product manager accesses the Products dashboard to review information about the top ten products. A series of charts on this dashboard shows information from several perspectives. The product manager then accesses the Exception dashboard to view information about the top ten defective products and about obsolete products. This information can be used to make sure that the sales force is not emphasizing these products in its sales efforts.

The product manager also examine the customer satisfaction reports to assess the sources of common problems encountered by customers.

### **Pricing Manager**

The pricing manager accesses the Pricing dashboard to obtain information about average selling prices and to examine revenue distribution across product lines. This information can be used to determine whether products are priced properly.

To gauge price list effectiveness, the pricing manager also examines revenue distribution and pricing trends by price list. Additionally, the pricing manager looks at various views of product promotions to see which promotions are the most profitable and which are the least profitable.



# **Siebel Product Analytics Dashboards**

The Product Selling Analytics dashboards are available to users of Siebel Product Selling Analytics.

## **Executive Analytics**

This dashboard is for senior executives who need information about their organization's performance as a whole. It provides information about products and about order processing. It also includes an overview of the state of an organization's business, across customer channels.

## **Product Analytics**

This dashboard is for product managers who need information about all aspects of their products. It provides information about product revenue, packaging, marketing campaign results, cross-sell and upsell opportunities, and customer satisfaction issues.

## **Pricing Analytics**

This dashboard is for product and pricing managers who need information about the impact of pricing practices on revenues and profits. It includes information that tracks product price over its life cycle, discounts, region-specific margins, contract and agreement profitability, and price list effectiveness.



# Siebel Marketing Analytics **17**

Siebel Marketing Analytics provides information to business users in marketing organizations. This chapter describes a sample business scenario, and provides information about the dashboards in Siebel Marketing Analytics.

## **Siebel Analytics Marketing Business Scenario**

This scenario is an example of a process flow performed by several employees in an organization's marketing department during the course of running and planning various marketing campaigns. Your organization may have a different process.

### **Marketing Manager**

A marketing manager logs in to Siebel Marketing Analytics every day and accesses the Campaign Performance dashboard. Here, the manager studies the performance of all active programs run by the department.

First, the manager examines the Program Summary report to view information about the overall performance of a specific program. The report shows a lower-than-expected response rate. To see which segments are experiencing poor response, the manager views the Segments tab. The data shows that the Gold customer segment has not been responding well to the offer of a free warranty. The manager decides to target a sample of the Gold customer segment with a different product offering.

The manager runs the Campaign Scorecard report. This generates scorecards for the marketing programs that ran in the previous quarter. The report acts as a focal point for return on investment (ROI). The manager, and others in the organization, use this information to monitor campaign performance and to justify the marketing budget.

On the Product dashboard, the manager observes that most customers in the Gold customer segment have purchased a particular brand of high-end server. The Product Propensity report shows that customers who own the high-end server usually own a specific software backup package and a storage server.

To determine which of these products to promote to the Gold customer segment, the manager views the Next Product Purchased report. The report shows that most customers who purchased the high-end server also purchased the storage server. The manager uses Siebel Answers to construct a report that returns the number of customers who own the high-end server but do not own the storage server.

The manager gathers information from the reports in the Interaction tab, and metrics from the Customers and Consumer subject areas. The manager then applies several enterprise contact-planning rules to determine the number of customers that can be targeted with an upsell message for the storage server.

Finally, the manager accesses the Siebel Marketing application and uses the Financial Modeler to model the potential ROI in an upsell campaign. The manager then submits the upsell campaign to the marketing vice president for approval.

## **Marketing Vice President**

The marketing vice president logs in to Siebel Marketing Analytics to view information about the various marketing programs that are running in the current quarter. The Program Summary report shows the amount of revenue that these programs are contributing to the organization's bottom line.

The vice president then accesses the Spending tab to investigate the distribution of dollars spent. This information is available by categories, such as customer attributes, region, various campaign types, and marketing divisions.

Next, the vice president accesses the Highlights tab to obtain current information about which product lines, partner programs, customer segments, and specific accounts are doing well. Finally, the vice president checks the Challenges tab, which contains reports showing information about competitive opportunities. The information from these tabs helps the manager and the vice president to design marketing programs that support the sales force by building a healthy pipeline.

## **Siebel Marketing Analytics Dashboards**

Siebel Marketing Analytics dashboards are available to users of Siebel Marketing Analytics.

### **Campaign Performance Dashboard**

This dashboard accesses information about campaign performance by metrics, such as ROI, response rate, leads generated, and orders booked. You can analyze these metrics from several points of view. For example, at one time, you may analyze the response rate for a given offer within a campaign. At another time, you may analyze the response rate for the same offer, but across various campaigns.

Each page tab on the dashboard contains reports that provide analyses about a particular dimension, such as programs, offers, and segments. Reports on responses, opportunities, and orders allow you to analyze by facts for campaigns.

### **Marketing Executive Dashboard**

This dashboard provides information about key areas of the business. Reports on this dashboard show the status of all current marketing programs in the aggregate. Executives can then drill into details. Some reports allow executives to view how the marketing budget is being spent by various types of programs, such as cross-sell, acquisition, and so on, as well as by region.

A report showing the distribution of marketing dollars, spent across the customer base, allows executives to obtain information by customer attributes, such as gender and age. If the programs are business-to-business (B2B), these attributes can be replaced by account attributes, such as Account Vertical, Region, and so on.

This dashboard also contains reports, such as Top 10 Product Lines, Segments, Accounts, and Partners. Some reports highlight the challenges facing a marketing department, such as pipeline overview, the top five competitors, competitive opportunity revenue, and programs that are performing poorly.

## Customer Insight (Business) Dashboard

This dashboard provides customer-centric analysis of a business customer base. It analyzes the demographics of the customer base, based on RFM metrics, number of products owned, and loyalty metrics.

This dashboard contains product affinity analyses that show product purchase behavior, as follows:

- The Market Basket report shows the frequency with which products are purchased together in the same order. You can group this information by account attributes, such as SIC codes, Vertical, Region, Revenue Growth Category, RFM, and so on. The report also shows orders in a certain order date range only. Additionally, this report analyzes the products, in the same order, that earn the maximum margin, maximum revenue, and so on.
- The Next Product Purchased report shows which products follow the purchase of other products. This analysis can also be done on a product line basis.
- The Product Propensity report shows which product purchases tend to group together over time. For businesses that purchased a particular product, such as a high-end server, you can see the other products that they purchased most frequently.

Several reports in this dashboard also assist with elements of enterprise contact planning, as follows:

- The Over and Under-promoted Customers report groups customers by the number of times they were promoted. From this report, you can drill down to a report that shows the propensity to respond. The report groups responders into High, Medium, and Low response categories. Drilling down again shows how much revenue the selected group earned.
- The Promotion Frequency Analysis of Accounts report groups customers by the gap between promotions.
- The Overlap of Campaigns with Other Campaigns by Account report analyzes the overlap in promotions to the same accounts. The analysis can be performed by Campaign Name, Campaign Type, and Campaign Division. After a campaign is populated in Siebel Marketing, and after the data is brought into the Siebel Data Warehouse prior to campaign execution, this report can show which divisions and campaigns are promoting to the same accounts.

## **Customer Insight (Consumer) Dashboard**

This dashboard provides customer-centric analysis of a consumer customer base. It analyzes the demographics of the customer base, based on RFM metrics, number of products owned, and loyalty metrics.

This dashboard contains product affinity analyses that show product purchase behavior, as follows:

- The Market Basket report shows the frequency with which products are purchased together in the same order. You can group this information by account attributes, such as SIC codes, Vertical, Region, Revenue Growth Category, RFM, and so on. The report also shows orders in a certain order date range only. Additionally, this report analyzes the products, in the same order, that earn the maximum margin, maximum revenue, and so on.
- The Next Product Purchased report shows which products follow the purchase of other products. This analysis can also be done on a product line basis.
- The Product Propensity report shows which product purchases tend to group together over time. For customers who purchased a particular product, such as a laptop computer, you can see the other products that they purchased most frequently.

Several reports in this dashboard also allow you to perform elements of enterprise contact planning:

- The Over and Under-promoted Customers report groups customers by the number of times they were promoted. From this report, you can drill down to a report that shows the propensity to respond. The report groups responders into High, Medium, and Low response categories. Drilling down again shows how much revenue the selected group earned.
- The Promotion Frequency Analysis of Accounts report groups customers by the gap between promotions.
- The Customers in Overlapping Campaigns report analyzes the overlap in promotions to the same customers. The analysis can be performed by Campaign Name, Campaign Type, and Campaign Division. After a campaign is populated in Siebel Marketing, and after the data is brought into the Siebel Data Warehouse prior to campaign execution, this report can show which divisions and campaigns are promoting to the same customers.



# Siebel Partner Relationship Management Analytics 18

Siebel Partner Relationship Management (PRM) Analytics provides information to business users in organizations that work with partner life cycle management. Siebel PRM Analytics provides multiple areas of analysis, including order, quote, and training analytics. It also includes analytics on the partner portal that partners access through the Internet.

This chapter describes a sample business scenario and provides information about the dashboards in Siebel PRM Analytics.

## **Siebel Analytics Partner Relationship Management Business Scenario**

This scenario is an example of a process flow performed by several employees in organizations that have partner relationships. Your organization may have a different process flow.

### **Channel Executive**

For partner management, the channel executive at the brand owner organization is responsible for defining overall channel strategy. To make informed decisions, the executive needs current information about metrics related to partner performance, such as pipeline, closed revenues, and customer satisfaction. For example, a brand owner may need to segment partners based on performance. If 20 percent of the partners are responsible for 80 percent of revenue, the channel executive needs to identify these partners so that the brand owner can invest in those relationships.

Executive analytics in the Siebel Partner Manager application provide information that the channel executive can use to identify the best-performing partners. The executive can view information about partners based on revenues generated and potential pipeline. The channel executive can also evaluate partners based on overall customer satisfaction scores and partner responsiveness in addressing customer needs.

The channel executive can use these metrics to identify the best-performing partners across all attributes. The brand owner can then develop programs that target the best-performing partners in the areas of partner loyalty and productivity. The channel executive can also identify partners that are not performing well, and develop appropriate programs to improve their performance.

## **Partner Operations Manager**

For the partner, the partner operations manager at the partner site is responsible for overseeing the partner's relationship with the brand owner. The operations manager monitors the pipeline, customer satisfaction scores, and service performance in addressing end customer needs.

The dashboards in Siebel Partner Analytics provide information that the partner operations manager can use to better manage the relationship with a brand owner. For example, the partner operations manager can identify the best-selling products and the products that are not selling well. If customer profile analytics indicate that poorly selling products have a strong potential for sales in a certain customer base, the operations manager can work with the partner executive and the marketing manager to develop campaigns to target that customer base.

# Siebel Partner Manager Analytics Dashboards

This topic describes the dashboards in the Siebel Partner Manager Analytics application.

## Executive Analytics

This dashboard provides channel executives with an overall analysis of partner life cycle management.

## Segmentation Analytics

This dashboard is for channel executives and channel operations managers. It provides information about partner performance, based on attributes, such as partner type, partner tier, and partner territory. It also compares information for direct and indirect channels.

## Customer Analytics

This dashboard shows the overall profile of the brand owner's customer base. It shows information about customers, based on attributes, such as annual revenues and vertical segments. It also shows top partner accounts by revenue and high-risk customer accounts.

Channel operations managers and channel marketing managers can use information from this dashboard to define campaigns that target new customers and to address high-risk customer accounts.

## Sales Analytics

This dashboard shows channel operations managers information about the sales performance of all partners. Pipeline analytics shows the current and historical pipeline across all partners. The sales manager can monitor closed business, wins, and losses. The dashboard also shows information about sales effectiveness, based on metrics, such as the length of sale cycle.

The reports in this dashboard also allow operation managers and sales managers to evaluate the margins and revenues associated with specific products.

## **Service Analytics**

This dashboard provides managers with information about service performance across all partners, based on metrics, such as resolution rate and resolution time. Service managers can track high-risk customer accounts, based on the number of open and critical service requests. Service managers can also monitor partner customer satisfaction scores.

The dashboard also provides managers with information that can be used to improve the effectiveness in meeting customer requirements, across all partners.

## **Partner Marketing Analytics**

This dashboard is for channel operations managers who are responsible for executing targeted marketing campaigns to recruit prospective partners. It provides information about campaigns focused on recruiting new partners. It also provides information about the productivity of partner-oriented campaigns.

## **Customer Marketing Analytics**

This dashboard provides information about the effectiveness of brand owners' joint campaigns with partners to acquire new customers. It shows the overall profile of the customer base, based on attributes, such as annual revenues and vertical segments.

## **Commerce Analytics**

This dashboard provides information about orders, quotes, and product performance across all partners. Brand owners can analyze partners based on metrics, such as order revenue and quote revenue. Brand owners can also view the performance of product lines, based on revenues and margins.

## **Training Analytics**

This dashboard provides information about the training performance of partners and partner representatives. It also shows brand owners the courses that are most valuable to partners. Trend reports provide information about trends over time, such as the most valuable courses and partner test performance.

# Siebel Partner Portal Analytics Dashboards

This topic describes the dashboards in the Siebel Partner Portal Analytics application.

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**NOTE:** Dashboards and reports on the partner portal only allow partners to view data for their respective organizations.

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## Executive Analytics

This dashboard provides partner executives with information about their relationships with brand owners. Partner executives can monitor the pipeline, evaluate the effectiveness of their sales force in selling brand owner products, and view the top brand owner products sold by their organization. Partner executives can also use this dashboard to identify their high-risk customer accounts.

## Sales Analytics

This dashboard provides partner sales executives with information about their partner sales pipeline for selling brand owner products. The dashboard provides analytics on the partner's customers, based on attributes, such as annual revenues and vertical segments. The dashboard also includes reports for sales representatives so that they can monitor their own performance.

## Commerce Analytics

This dashboard provides partners with information about the products quoted and sold by their respective organizations. Reports about orders provide partners with information about the brand owner products ordered for customers.

## Marketing Analytics

This dashboard provides information about the effectiveness and productivity of joint marketing campaigns to attract customers.

## **Partner Service Analytics**

This dashboard provides information about the service performance of partners. The information is based on metrics, such as resolution rate and resolution time. The dashboard includes an overview of service requests for the partner, based on a range of attributes.

Customer satisfaction analytics provides information about customer satisfaction with customer-partner interactions. The dashboard also includes reports for service representatives so they can monitor their own performance, based on service request resolution rates and time.

## **Training Analytics**

This dashboard provides information about the training performance of partners. The reports show sales and service performance, based on metrics, such as the number of courses taken and the rate at which tests are passed.





# Siebel ePharma Analytics 19

Siebel ePharma Analytics provides information to business users in pharmaceutical sales organizations. Siebel ePharma Analytics includes reports for call activity analytics, prescription (Rx) sales analytics, and Pharma return on investment (ROI) analytics. It also provides support for Brick-based analytics.

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**NOTE:** A Brick is a micromarketing area of indirect sales or scrip data, supplied by syndicated data vendors.

---

This chapter describes a sample business scenario and provides information about the dashboards in Siebel ePharma Analytics.

## **Siebel Analytics Pharmaceuticals Business Scenario**

This scenario is an example of a process flow performed by a pharmaceutical organization to analyze sales, analyze call activities, define new targets to meet objectives, and measure results. Your organization may have a different process flow.

### **Sales Executives**

Pharmaceutical sales executives use ePharma Analytics to assess the health of their sales organization. The Pharma Sales Executive dashboard provides an assessment of call activity effectiveness, sales effectiveness, profit and loss (P&L) of call activities and return on investment (ROI) of medical education events.

### **Sales Manager**

Sales managers use Siebel ePharma Analytics to measure, monitor, and optimize sales effectiveness. The sales management team needs to examine and understand the effect of call activities on the prescription habits of targeted physicians. They want to examine sales and prescription results by sales representative, contact segment, time period, sales force, and product.

A sales manager uses Siebel ePharma Analytics to measure the effectiveness of the sales team. For each sales representative, the manager examines targeting efforts, call frequency, call reach, and achievement toward sales objectives and targets.

After assessing weak sales territories, the manager decides to coach the under-performing sales representatives. The goal of the coaching is to help them identify high-potential under-penetrated areas and contacts on which to focus future call activities.

Finally, the manager uses the Call Activity Profit and Loss dashboard to see profit and loss resulting from call activities. The manager can then take action as needed.

## **Sales Operations/Market Research Analyst**

The sales operations analyst needs to integrate data from external syndicated data sources with Siebel applications data to create reports on call activity effectiveness. The organization has purchased large amounts of syndicated data from a third party that collects and integrates sales and prescription transactions from pharmacies, pharmacy benefit managers, and drug wholesalers. The analyst uses Siebel ePharma Analytics, which contains extraction and integration routines for syndicated information, to examine the third-party data.

## **Sales Representatives**

Pharmaceutical sales representatives use ePharma Analytics within the product detailing process. On a weekly basis, sales representatives use the Pharma Sales Representative dashboard to review sales objectives and quotas, analyze physician targets, and analyze sales, scripts, and call activity. They use this information to develop plans for meeting sales objectives, such as creating target lists and messaging, planning routes, scheduling calls, and visiting physicians.

The sales representatives uses ePharma Analytics to examine and understand physician profiles, review the latest physician Rx (prescription) rankings, review call frequency targets, and plan and schedule the week's calls.

## **Siebel ePharma Analytics Dashboards**

Siebel ePharma Analytics dashboards are available to users of Siebel ePharma Analytics.

### **Pharma Contact Call Effectiveness Analytics**

This dashboard provides information about the contact call activities of sales representatives. These activities include detailing, sampling, and promotional item drops. The activities are compared to potential derived from syndicated data sources. These comparisons provide information about the promotional effectiveness of contact call activity.

Sales and marketing executives can view call activity data to determine how effective the field sales representatives are at covering their respective territories. The reports in this dashboard allow you to compare the prescription potential of geographies and customer segments by franchise, specialty, postal code, decile, and so on, down to the individual prescriber and account.

### **Pharma Account Call Effectiveness Analytics**

This dashboard provides information about the account call activities of sales representatives. These analyses include detailing, sampling, and promotional item drop activities, compared to potential derived from syndicated data sources.

### **Pharma Sales Analytics**

This dashboard provides information about new prescriptions, total prescriptions, direct sales, indirect sales, and indirect units results. Sales and marketing executives can use the prescription and sales data in these reports to help understand market share and product trends.

### **Pharma Call Activity Profit and Loss Analytics**

This dashboard is for sales and marketing executives. It analyzes spending against product details, samples, and promotional items dropped against new prescription data. Results appear in monetary amounts. Users can also analyze the return on promotional investment by sales representative, postal code, time, and individual prescriber.

The charts and graphs in this dashboard allow you to choose different measures and ratios to use in analyzing the data.

## **Pharma Medical Education Analytics**

This dashboard is for sales and marketing executives. It can be used to analyze medical education plans and event spending against new prescriptions generated after the events. It can also be used to measure prescription lift and ROI per event.

Sales managers can assess medical education event effectiveness, speaker analysis, and event analysis. Budget analyses, with charts and graphs, allow you to choose different measures and ratios to analyze the data.

Users can also analyze medical education events by sales representative, product, time, and individual attendees.

## **Pharma Sales Objectives Analytics**

This dashboard is for sales managers and sales representatives. It can be used to assess performance against sales targets and call frequency. It can also be used to determine coverage by sales territory, call activities by product indication, n-tile ranking, and order of presentation.

Users can analyze target results compared with actual results for activities and prescriptions, the distribution of all contact and account calls, and product details.

Product managers can also see information about the indicators in product details.

## **Pharma Executive Analytics**

This dashboard is for senior sales executives. It provides executives with an overview of sales and call activities, for use in assessing organizational health.



# Siebel Sales Analytics **20**

Siebel Sales Analytics provides information to business users in sales organizations. It provides several areas of analysis, including opportunity, forecast, and order analysis. Siebel Sales Analytics also includes Incentive Compensation analytics.

This chapter describes a sample business scenario and provides information about the dashboards in Siebel Sales Analytics.

## **Siebel Analytics Sales Business Scenario**

This scenario is an example of a process flow performed by a sales organization's vice president, sales manager, and sales representative. Your organization may have a different process.

### **Vice President of Sales**

The vice president of sales uses Siebel Sales Analytics to obtain information about the effectiveness of the high-level sales strategy. The vice president begins by accessing the Pipeline Analytics dashboard to examine information about the current pipeline, actual revenue, and forecast revenue in relation to historical benchmarks. The vice president can use this information to determine whether the organization is likely to achieve its quarterly sales target.

The vice president observes that the organization is ahead of actual revenue but behind on forecast revenue and pipeline. The vice president accesses the Competitive dashboard to view information about wins by and losses to competitors, and observes that one competitor's product is doing well this quarter.

Next, the vice president accesses information about demand generation. The vice president will use this information to help determine how to increase the number of leads coming into the pipeline. The vice president then examines information about sales leads, and sees several charts that indicate the success of a recent campaign for a new product. The campaign produced a significant number of new leads that the organization is now working with.

The vice president then contacts the vice president of marketing for information about running a similar campaign, targeted to emphasize the strengths of the product over the competitor's product.

### **Sales Manager**

Every day, the sales manager accesses the Pipeline Analytics dashboard and reviews a chart that shows forecast sales, sales quota, and actual sales for every sales representative. This provides a detailed overview of team performance and identifies sales representatives that may need assistance.

The sales manager observes that the team is generally on target, and then accesses the Sales Effectiveness dashboard to look at other performance indicators for each sales representative, such as sales cycle, close rate, win rate, and average discount.



The sales manager observes that one sales representative has a below-average win rate and an above-average discount. To help the representative optimize sales efforts, the sales manager decides to help the representative improve selling skills.

## **Sales Representative**

Every morning, a sales representative accesses the pipeline analytics overview to examine the overall health of opportunities in the pipeline. The representative looks at a chart that shows forecast sales, sales quota, and actual sales. The representative also views a list of the top ten opportunities in the current quarter and a funnel chart that shows the value at each stage of the pipeline. The representative uses this information to identify gaps that should be closed to keep the pipeline full.

The representative observes that forecast sales are slightly lower than quota, and that the value of late-stage opportunities in the funnel chart is not high enough. The representative wants to increase the value of the opportunities in this quarter to achieve quota. To determine the products that have a high attach rate to the products in the current opportunities, the representative accesses the Customer dashboard and examines the cross-sell candidates chart. This allows the representative to select products that can be introduced to customers on the next visit.

## **Siebel Sales Analytics Dashboards**

Siebel Sales Analytics dashboards are available to users of Siebel Sales Analytics.

### **Pipeline Analytics**

This dashboard provides information about the composition, quality, and expected timing of their current pipelines. It also provides information about how forecast and actual revenues compare to the established quotas.

### **Sales Effectiveness Analytics**

This dashboard provides information and analyses by combining performance metrics with effectiveness metrics. This allows you to assess your achievements. This overall performance view provides you with information about factors that contribute to success and trends over time.

### **Demand Generation Analytics**

This dashboard provides information about lead generation activities and effectiveness to all levels of the sales organization.

### **Customer Analytics**

This dashboard provides information about an organization's customer base. Users can use this information to improve the effectiveness of the sales organization.

### **Competitor Analytics**

This dashboard provides information about the competitive environment in which an organization operates. It provides information about competitive threats and past competitive performance.

### **Siebel Incentive Compensation Analytics**

This dashboard provides information and analyses for use in incentive compensation achievement and attainment.

# Siebel Service Analytics **21**

Siebel Service Analytics provides information to business users in service organizations, in the areas of agreements, email, and universal queuing analytics.

This chapter describes a sample business scenario and provides information about the dashboards in Siebel Service Analytics.

## **Siebel Analytics Service Business Scenario**

This scenario is an example of a process flow performed by several employees in a software company's service organization. The organization provides services over the telephone and through a field service organization. Your organization may have a different process flow.

### **Vice President of Services**

The vice president of services uses Siebel Service Analytics to get an overview of the service organization's performance, at present and over time. Every day, the vice president accesses the Executive Analysis option.

The Overview page shows a list of the customers that have the highest numbers of critical open service requests. The vice president drills down into the chart named Resolution by Region and observes that the North region has a high number of open issues. The vice president decides to contact the director of the North region to offer assistance.

The vice president then checks the Financial Performance page to view revenue attainment for the current quarter. The vice president observes that several telesales representatives are experiencing difficulty moving their large opportunities through the pipeline. The vice president contacts these representatives, learns that a conference call with each of the targeted prospects would expedite the movement of the opportunities through the pipeline, and schedules the calls.

### **Call Center Manager**

The call center manager uses Siebel Service Analytics to review daily operations of service teams. The manager accesses the Manager Analytics option. This shows the service loads for each employee on the team.

The manager observes that several employees have unusually high loads. To investigate this, the manager goes to the Operations page and analyzes the Overdue Activities by Employee report. After speaking with several service technicians, the manager dispatches more technicians to the overloaded area before it becomes a customer service performance issue.

Next, to prepare for a weekly meeting, the manager goes to the Service KPI page and views the latest report on performance indicators. The report shows first time fix rates, costs per service call, a list of the most satisfied customers, and a list of the least satisfied customers. Service Analytics updates the information every time the manager accesses the report. The time that the manager used to spend collecting this information each week can now be used to focus on other tasks.

## **Call Center Agent**

The call center agent uses the information provided by Siebel Service Analytics to perform tasks more efficiently. Every day, the call center agent accesses the Employee Analytics option.

The To Do List page lists the telephone calls that the agent needs to make as soon as possible. This list is populated from the call center's Interactive Voice Response (IVR) system. It lists high-value customers who placed calls earlier in the day, but were unable to complete the calls. This list helps the agent make sure that these customers get service.

After completing the tasks on the To Do List page, the agent goes to the Performance page. This shows the agent's response time on assigned calls and the results of customer satisfaction surveys from those calls. The agent uses this information to identify areas that need improvement and begins working on an improvement plan.

## **Field Service Representative**

The field service technician uses Service Analytics to prepare for service calls. The technician is about to visit a customer who purchased an annual service contract that is now up for renewal. The technician wants to upsell an extended service agreement to this customer. The technician accesses the Agreements dashboard, looks at the Service History page, and determines that a service contract saved the customer money.

The technician prints the service history and takes it on the service call. At the completion of the service call, the technician uses the information the Service History page to sell the customer an extended service agreement.

## **Siebel Service Analytics Dashboards**

Siebel Service Analytics contains dashboards that provide information to all levels of the service organization, and dashboards that focus on services.

### **Service Executive Analytics**

This dashboard provides services executive with information about the composition, quality, and expected timing of current service business. It also provides information about how the business may do in the future.

Service executives can see information about accounts that have critical service issues. For these accounts, service executives can see how the organization is handling resolutions, contract renewals, and profitability. Information about service trends shows how the service organization is resolving issues by channel, region, product line, and severity. Service executives can also view information about financial performance, including the revenue pipeline.

### **Service Manager Analytics**

This dashboard shows information about the effectiveness and daily operations of the service organization. It provides information about specific performance areas, and helps the Service Manager identify issues before they begin to have a negative impact on customer satisfaction.

Service managers can view information about employee activities, such as service workload and revenue per employee. They can also see information about overdue activities, unusual problem area that may require special attention, contact center and service operation effectiveness, and the number of activities required to resolve a service issue.

Service managers can examine key performance indicators, such as cost per service call, to obtain an overall indication of the service organization's performance.

### **Service Employee Analytics**

The Service Employee dashboard is for employees who are responsible for service delivery operations. This dashboard contains pages for call center agents, field repair technicians, and technical support representatives. These employees can view information about areas that directly affect their jobs, such as overdue activities.

Service representatives can view information that can help them resolve service issues, such as customer order and service history. They can also see a list of experts within the service organization.

Call center agents can track their daily performance in the service delivery process by viewing the average handling time for communication channels and other key performance metrics.

### **Service Request Analytics**

This dashboard is for service managers. It shows information about service requests, across all channels. Service managers can see service request trends by source and severity; the top ten services accounts and products; and product lines with the largest number of open, critical service requests. This dashboard also shows information about service request resolutions.

### **Activities Analytics**

This dashboard is for service managers who need information about specific activities in their organizations. Service managers can view activities by organization, volume, and associated service costs. Information about field service activities is displayed by category and by the region in which the activities were performed. This information includes travel time spent and costs incurred. This information can help the service manager identify poorly performing regions.

Information about email use is available for service organizations through Siebel Email Response. This information is for service managers who oversee the email channel within the support organization. The dashboard shows information, such as email volumes by type, status, and account. Organizations using Siebel Smart Answer can use this output to analyze email by response category.

### **Orders Analytics**

This dashboard is for service executives and managers who need order tracking information throughout the order management process. It provides information about the order tracking, fulfillment, and management process within a service organization.

Summary information is available for order volumes, revenue, and status. Information about order fulfillment effectiveness includes the tracking of parts and orders. Information about shipment trends over time helps the service manager to isolate products with problems, based on returned units, and to plan for future product demand.

### **Assets Analytics**

This dashboard is for service managers and executives who need to track assets. Information is available for serviced assets and warranty expirations. Information is also available for asset distribution by account, product line, organization, employee location, and inventory location.

Trend information includes the number of assets shipped, installed, and registered over time. Service managers and executives can analyze this data by product line or by account to identify product acceptance trends.

### **Agreements Analytics**

This dashboard is for service managers and executives who need information about service contract profitability. This information can be used to help determine the revenue impact of service programs and their acceptance among customers. Information is available for service agreement revenues and profitability, such as agreement up for renewal, agreement revenue, and profitability over time.

Service history information can help identify the amount of money spent or saved by a customer as a result of buying or opting out of an extended service contract. It can also be used to help identify products and activities that reduce the service organization's profitability.

Trend information includes historical revenue, profitability, and service agreement renewal trends. Service executives and managers can use this information to compare performance over time.

### **Universal Queuing Analytics**

This dashboard is available to organizations using Siebel Universal Queuing. It is for the contact center manager who needs to track the performance of a call center. The dashboard is for use in complying with service level agreements and providing customer satisfaction.



Information is available for target, actual, and historical service levels for each channel and route. It displays the number of work items handled for each channel, the longest wait time for a work item, and the number of abandoned work items for each channel and route.

Contact center managers can view current and historical performance data for each channel and route. They can use this data to compare performance over time. Call center managers can also use this information to make staffing changes in response to call volume or other factors.

Information is also available for tracking call center agent performance, such as the number of work items handled and the percentage of time spent by each agent on each channel of communication. Managers can use this information to analyze employee performance.



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